



▶ Polycom<sup>®</sup> Digital Signage<sup>™</sup>  
(PDS<sup>™</sup>) 2000  
Administrator Guide

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# About this Guide

This introduction provides a brief overview of the *Polycom Digital Signage Administrator Guide*, describes the conventions used in this manual, and explains how to get additional information or support.

## Purpose

The *Polycom Digital Signage Administrator Guide* describes how to configure and use the Polycom Digital Signage Player and Remote Manager for a complete digital signage solution.

## Documentation

The *Polycom Digital Signage Administrator Guide* is part of the Polycom Digital Signage documentation set, which includes:

- *Polycom Digital Signage Administrator Guide* - This document.
- *Polycom Digital Signage Server Getting Started Guide* - Describes set-up and installation of the Polycom Digital Signage Server.
- *Polycom Digital Signage Player Getting Started Guide* - Describes set-up and installation of the Polycom Digital Signage Player.
- *Polycom Digital Signage Content Management Guide* - Describes publication of content via the Polycom Digital Signage Web Controller. This document is intended for Polycom Digital Signage Content Managers.
- *Polycom Digital Signage Release Notes* - Describes the product release. This document also identifies known problems and their workarounds, information not covered in the manuals or that has been modified since publication, as well as problems that have been fixed since previous releases.

## Audience

This guide is primarily for:

- Polycom Digital Signage Administrators - Responsible for configuring and managing the Polycom appliance. You should have a working knowledge of media publication, peripheral ports, network protocols, and media streaming and editing. You should also be familiar with Web fundamentals, such as URLs and HTML.

## Customer Support

Recognizing that technology alone cannot solve today's complex challenges, Polycom Global Services provides the industry's best technical support staff and programs to let you concentrate on the task at hand. Polycom users can select from a variety of support solutions to obtain the level of support that best meets their needs.

Before contacting your Polycom Global Services representative for technical assistance, gather as much information as possible about your situation. Any information you can provide helps us assess the problem and develop an appropriate solution.

## Polycom Global Services Telephone

If you have comments or questions about Polycom or if you need technical assistance, contact:

- Polycom Global Services in U.S.A. 888-248-4143

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# About Polycom Digital Signage

This chapter explains the Polycom Digital Signage architecture. This chapter includes the following sections:

- [Polycom Digital Signage Solution](#)
- [Architecture Overview](#)

## Polycom Digital Signage Solution

The Polycom Digital Signage solution is a combination of powerful applications, including the following components:

### Polycom Digital Signage Player

The Polycom Digital Signage Player is a powerful broadcast rendering engine that delivers the highest quality output with the highest level of reliability. Unlike simple video playback devices, the Polycom Digital Signage Player dynamically arranges and composes signage elements, objects or zones in real time to generate the final video output. This means individual content elements can be changed at any time, without requiring entire video segments to be re-rendered whenever a change is needed.

### Polycom Digital Signage Server

The Polycom Digital Signage Server automatically distributes new content to remote locations and receives continuous status updates from all Polycom Digital Signage Players.

### Polycom Digital Signage Remote Manager

The Polycom Digital Signage Remote Manager application works with the Polycom Digital Signage Server to enable administration of networks of players.

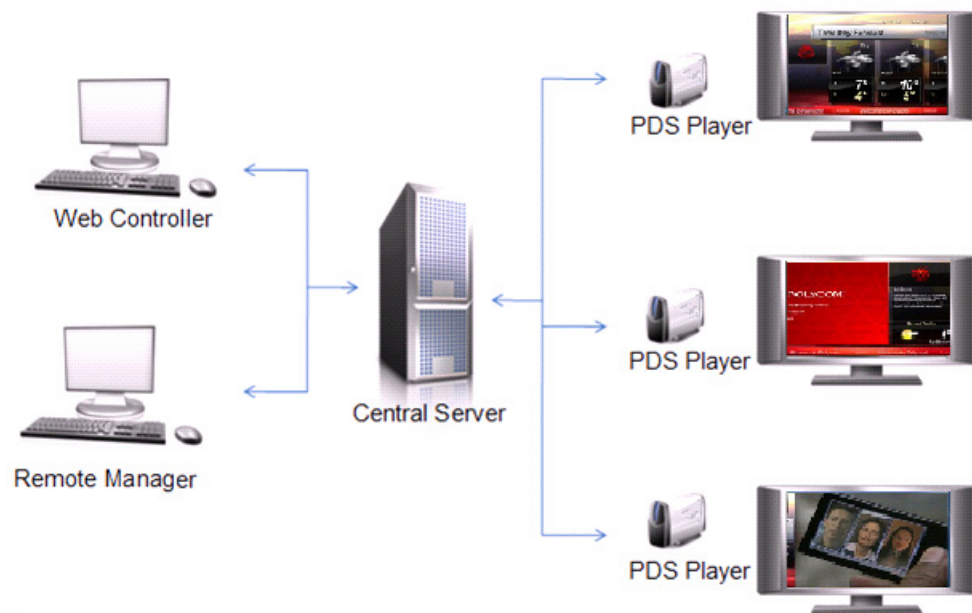
## Polycom Digital Signage Web Controller

The Polycom Digital Signage Web Controller software lets users easily update and manage content on the Players in a Polycom Digital Signage network, with point-and-click simplicity.

## Polycom Digital Signage Agent

The Polycom Digital Signage Agent software is the link between Players and the Server, enabling network status and health monitoring.

## Architecture Overview



The image above presents an overview of the Polycom Digital Signage solution, depicting the overarching architecture for the various components of the solution. Content, in the form of templates, assets, and playlists, is created, assembled and managed using the Polycom Digital Signage Web Controller. Users can easily update content using the Web Controller's point-and-click interface.

The content is automatically distributed to Polycom Digital Signage Players via the Polycom Digital Signage Server, which acts as the central hub for the Polycom Digital Signage system.

The Polycom Digital Signage Player renders content in real time for display to a monitor, with the Polycom Digital Signage Agent linking Players to the Server. The Polycom Digital Signage Agent also monitors the status of the



Polycom Digital Signage Player, and sends regular heartbeat and status messages to the Polycom Digital Signage Server. The Agent can also take steps to "heal" the Player if it detects a problem.

Administrators monitor and manage the system using the Polycom Digital Signage Remote Manager application. This software displays the status and details of all the Players connected to the system.

Administrators can also use the Polycom Digital Signage Remote Manager to distribute and manage content packages, as well as issue commands to individual players or groups of players, although content updates and distribution are typically handled via the Polycom Digital Signage Web Controller.

The Web Controller is used for day-to-day updates to content appearing on the monitors in a given Polycom Digital Signage network.



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# Configuring the PDS Player

This chapter explains the basic configuration processes for the Polycom Digital Signage Player. This chapter includes the following sections:

- [About the PDS Player](#)
- [Accessing the Player](#)
- [Configuring the Player Directly](#)
- [Configuring PDS Player Video Settings](#)
- [Startup Settings](#)
- [Options](#)
- [Configuring PDS Player Advanced Settings](#)

## About the PDS Player

The PDS Player is a powerful real-time broadcast rendering engine that delivers the highest quality output with the highest level of reliability. It offers reliable playback for 24x7 operation.

Unlike simple video playback devices, the PDS Player dynamically arranges slide elements in real time to generate the final video output. This means individual elements of the content can be changed at any time, without requiring that entire video segments be re-rendered whenever a change is required.

## Accessing the Player

After installation, the PDS Player can be configured directly or through Windows Remote Desktop Protocol (RDP).

If using RDP to access a Player, you will not be prompted to enter login credentials. Please note, however, that to reboot a PDS Player using RDP you will need to enter **ALT + F4**. This will launch a shut down dialog, from which you must select **Restart**.



**NOTE:** Accessing the Player via RDP locks the Player output. As a result, RDP is not a recommended tool for routine player management. If you wish to make content and configuration changes while the Player is running, use the Polycom Remote Manager and Polycom Web Controller.

## Configuring the Player Directly

After a Player has been set up, connected to an output, and connected to the network via the Polycom Digital Signage Agent, administrators can configure the Player for their particular implementation. The following sections outline the various configuration possibilities. Please note that the following process applies for all configuration changes:

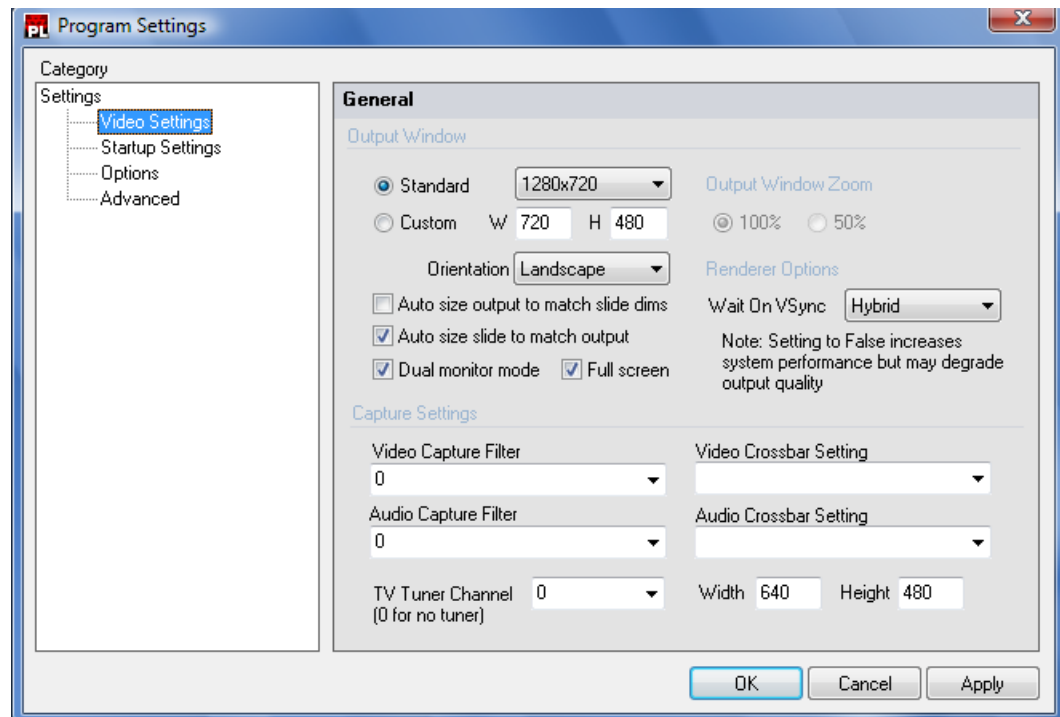
- 1 Launch the PDS Player from the desktop, if it is not already running.
- 2 Stop Player output by hitting **ALT + Esc**, if necessary.
- 3 Navigate to **Tools > Settings**. The Settings window will appear.
- 4 Choose which tab in the Settings window you wish to edit. The specifics of each tab are detailed below.
- 5 When configuration has been completed, click **Apply** and then **OK**.
- 6 Reload the Playlist in the Player.

## Configuring PDS Player Video Settings

PDS Player Video Settings is divided into two sections: **Output Window** and **Capture Settings**.

Settings defined in Output Window let you configure the properties of the PDS Player output window on the Player output display.

Settings defined in Capture Settings let you configure how the PDS Player communicates with 3rd-party capture devices.



## Output Windows Settings

The Output Window section of Video Settings includes the following configuration options:

- **Standard:** Specifies the dimensions of the video output window. Choose from a list of standard resolutions: 640x480, 720x480 (DV-NTSC), 720x486 (NTSC SMPTE), 720x576 (PAL), 800x600, 1024x768, 1280x720, 1280x1024, 1600x1200, and 1920x1080.
- **Custom:** Specifies the dimensions of the video output window according to the specified Width (W) and Height (H).
- **Orientation:** Specifies whether the video output window should be displayed in either Landscape or Portrait format, in conjunction with the Standard or Custom output window dimensions.
- **Auto size output to match slide dims:** When selected, the resolution of the video output window will scale to match the slide template dimensions.
- **Auto size slide to match output:** When selected, the resolution of the slide template is automatically scaled to match the resolution of the video output window.
- **Dual monitor mode:** When selected, configures the PDS Player display output to appear on a second monitor. This mode can also be used for cloning the display. This supports multiple monitors from one Player. See the *Polycom Digital Signage Player Getting Started Guide* for more details.

- **Full screen:** When selected, the PDS Player output will be displayed in full screen mode (either on the primary or secondary display). When unselected, the PDS Player output will be displayed in a separate window.
- **Output Window Zoom:** Select to resize the CG Rendering window to 100% (full size) or 50% half size when the Full screen mode is disabled.
- **Wait on VSync:** Depending on the features and the performance of your system's graphics card adapter, select one of the following options:
  - **True:** Significant loss of system performance with a high-quality graphics output result.
  - **Hybrid:** Improved system performance with some loss in the quality of the graphics output result.
  - **False:** Best possible performance with a low-quality graphics output result.

## Capture Settings

Capture Settings determine how video and audio are interpreted for input to the PDS Player.



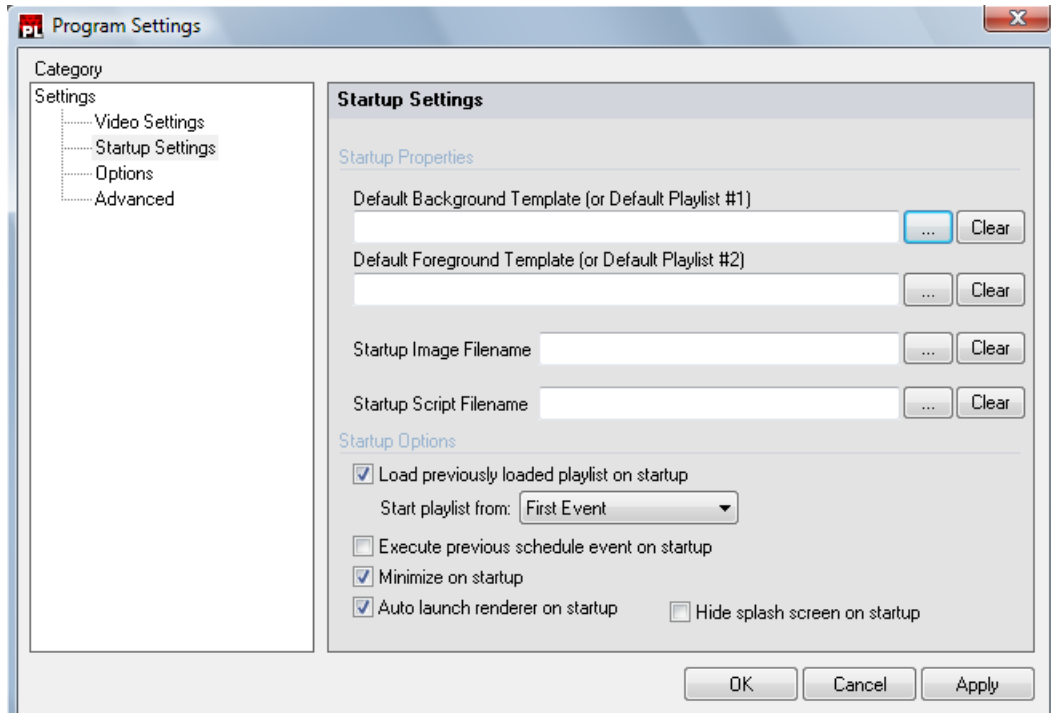
**NOTE:** Only custom implementations support changes to capture settings.

- **Video Capture Filter:** Select the device for inputting video to the PDS Player. This list depends on the video devices connected to the workstation.
- **Video Crossbar Setting:** Select the port for the video input to the workstation, for example SVideo In or Composite In.
- **Audio Capture Filter:** Select the device for inputting audio. This list depends on the audio card and audio devices connected to the workstation, for example SoundMAX Digital Audio.
- **Audio Crossbar Setting:** Select the port for the audio input to the workstation.
- **TV Tuner Channel:** Select the channel to tune to when capturing from a TV Tuner card. Select channel 0 if no TV Tuner card is present.

## Startup Settings

The PDS Player Startup Settings tab is divided into two sections: **Startup Properties** and **Startup Options**.

Settings defined in Startup Properties let you specify templates or scripts that may load when PDS Player initially launches, as well as application functions that may occur when PDS Player initially launches.



## Startup Properties

The Startup Properties settings of Startup Settings are described as follows:

- **Default Background Template:** Specifies a template to load by default in the background layer of the CG output when the PDS Player first launches.
- **Default Foreground Template:** Specifies a template to load by default in the foreground layer of the CG output when the PDS Player first launches.
- **Startup Image Filename:** Specifies an image to load in the CG output when PDS Player first launches.
- **Startup Script Filename:** Specifies a script to execute when the PDS Player first launches.

## Startup Options

The Startup Options settings of Startup Settings are described as follows:

- **Load previously loaded playlist on startup:** When enabled, loads the previously loaded playlist when the PDS Player launches. When disabled, the PDS Player launches remaining in a ready state with no content displayed on the CG output.

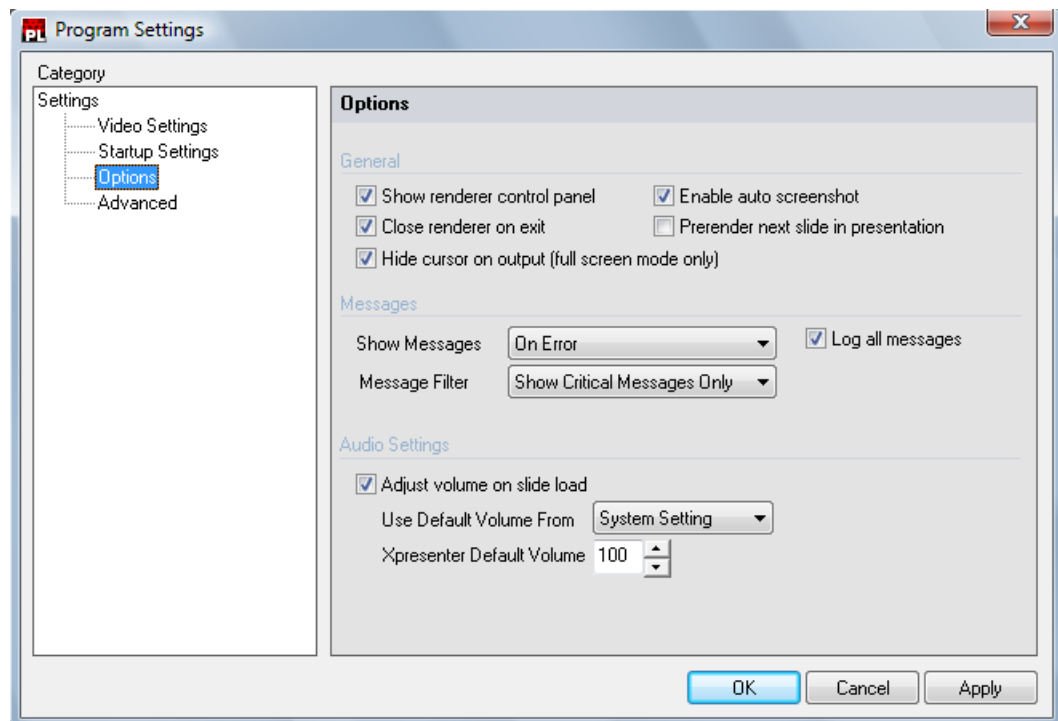


**TIP:** Enable **Load previously loaded playlist on startup** to automatically resume playback of your content on-air and recover from system anomalies or power failures

- **Minimize on startup:** When enabled, hides the PDS Player interface from the system desktop.
- **Auto launch renderer on startup:** When enabled, automatically launches the CG rendering engine.

## Options

The PDS Player Options tab is divided into three sections: **General**, **Messages**, and **Audio Settings**. Settings defined in General let you specify options available to the PDS Player. Settings defined in Messages let you specify options related to the Messages window. Settings defined in Audio Settings let you specify options related audio output from the PDS Player.





## General

The General Settings panel allows administrators to dictate certain general configuration settings for the CG Rendering engine that is launched by default from the PDS Player. The settings are described as follows:

- **Show renderer control panel:** When enabled, displays the CG rendering engine control panel.
- **Enable auto screenshot:** When enabled, takes screenshots of the content being displayed by the PDS Player. These screenshots are then displayed in the “Current Output Window” section of the PDS Player.
- **Close renderer on exit:** When enabled, closes the CG rendering engine when the PDS Player quits.
- **Prerender next slide in presentation:** When enabled, stores the next event in system memory while the current event is displayed on the output.
- **Restrict cursor to primary display:** When enabled, prevents the system mouse cursor from appearing on the secondary output of the the PDS Player.

## Messages

The Messages Settings panel is described as follows:

- **Show Messages Box:** The Messages dialog in the PDS Player interface provides moment-by-moment details regarding functioning of the PDS Player. The frequency of messages can be determined in the Show Messages Box. Select one of the following options:
  - **On Error:** Displays messages in the Messages dialog only when an error has occurred.
  - **Always:** Displays all messages-errors, information, status-in the Messages dialog.
  - **On Request Only:** Displays messages only upon request when you click the Show Messages button in the PDS Player.
  - **Log All Messages:** Writes all PDS Player events to the log file.
- **Message Filter Box:** Select one of the following options:
  - **Show Critical Messages Only:** Displays messages in the Messages dialog only when an error has occurred.
  - **Show All Messages:** Displays messages only when you click the Show Messages button in the Settings dialog. Messages displayed include content updates, configuration changes, output changes, and updates to data-driven templates, as well as error messages displayed in red text.

## Audio

The Audio Settings of the Options window are described as follows:

- **Adjust volume on slide load:** When enabled, increases or decreases the audio output level based on the number configured in the Player Default Volume.
- **Use Default Volume From Box:** Select one of the following options:
  - **System Volume:** the PDS Player will output audio based on the volume of the system's mixer settings
  - **PDS Setting:** the PDS Player will output audio based on the default volume specified.
- **PDS Default Volume:** Audio level (from 0 - 100) to use for audio output.

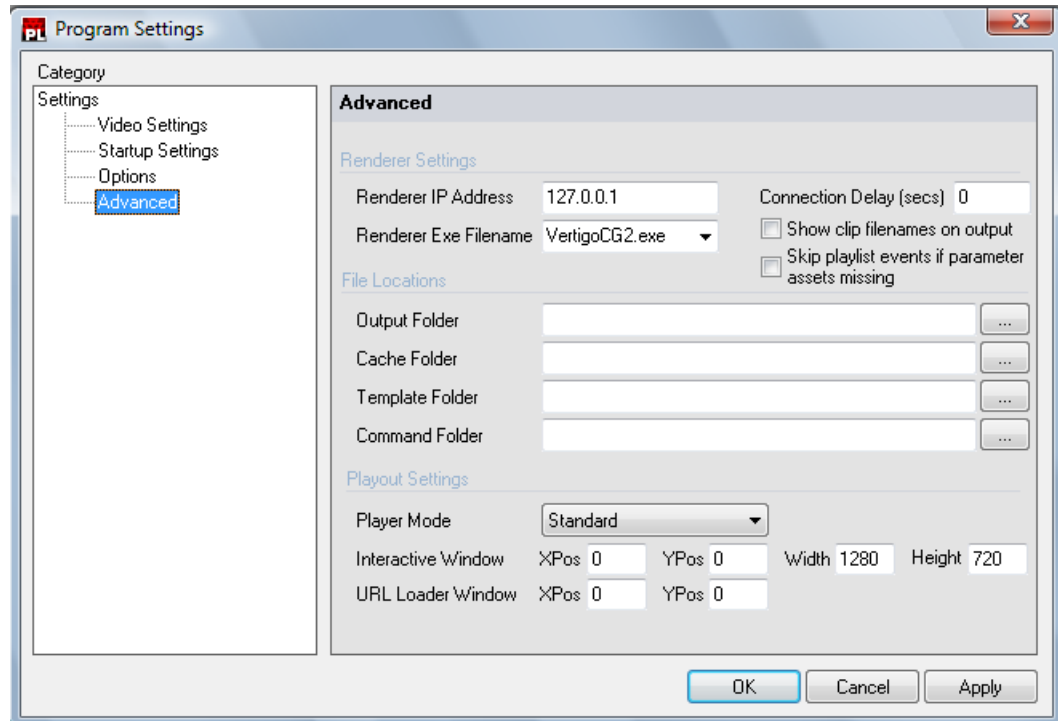
## Configuring PDS Player Advanced Settings

The PDS Player Advanced Settings tab allows users to change system defaults. These settings should not be changed without consulting Polycom Support.

The PDS Player Advanced tab is divided into three sections: **Renderer Settings**, **File Locations**, and **Playout Settings**.



**NOTE:** Please avoid modifying these values unless instructed to do so by Polycom support.



## Renderer Settings

The Renderer Settings options of Advanced Program Settings are described as follows:

- **Renderer IP Address:** Displays the IP address of the rendering engine.
- **Renderer Executable Filename:** Displays the executable filename that corresponds to the PDS rendering engine.
- **Connection Delay:** Displays the delay, in seconds, from the time you click the Render button until the scene is submitted CG rendering engine.

## File Locations

The File Locations configuration in Advanced Program Settings allow users to dictate which directories the PDS Player uses:

- **Output folder:** Displays the folder to which the CG Renderer sends rendered output that is displayed in the output monitor.
- **Cache folder:** Displays the folder to which the CG Renderer caches information while rendering the output.
- **Template folder:** Displays the default folder to which the PDS Player saves exported templates.

- **Command folder:** Displays the folder to which the commands are stored on the system for use with other PDS applications such as Remote Manager, or Web Screens.

## Playout Settings

The Playout Settings of the Advanced Program Settings are as follows:

- **Player Mode box:**
  - **Standard:** Configures the PDS Player to function as an authoring station.
  - **Interactive:** Configures the PDS Player to function as an interactive/kiosk station.



**NOTE:** Interactive mode is *not supported* in most implementations. Please do not select this option without input from Polycom support.

- **Interactive Window:** When in Interactive Player Mode, defines the topmost and leftmost location (XPos/YPos) and size (Width/Height), in pixels, of the interactive window.
- **URL Loader Window:** When displaying an internet browser window, defines the topmost and leftmost location (XPos/YPos) in pixels, of the Loader window.

---

# Using the PDS Player

This chapter outlines local control of the Polycom Digital Signage Player. In a typical implementation, however, all configuration and content management will be performed through the PDS Remote Manager and PDS Web Controller. Please note that these tools are described in subsequent chapters.

This chapter includes the following sections:

- [Getting Started](#)
- [The PDS Player Interface](#)
- [Scheduling Events with the PDS Player](#)
- [Controlling the VertigoCG Renderer](#)

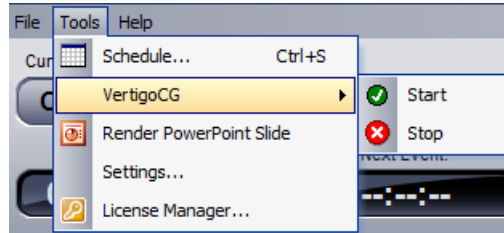
## Getting Started

When the PDS Player application is opened, it will immediately begin displaying the default playlist.

### Loading a Template

- 1 To load a PDS Template, in the PDS Player choose **File > Load Template...**
- 2 Locate a PDS Template (.xtmpl) on your computer and choose **Open**.  
The template plays in the PDS Player output.

- 3 If you have elected not to use full-screen mode, the content will be displayed on the CG Rendering Window. To disable the CG Rendering Window, open **Tools > VertigoCG** and select **Stop**. Alternatively, press ALT + ESC.



Further controls for the CG Renderer are detailed below.

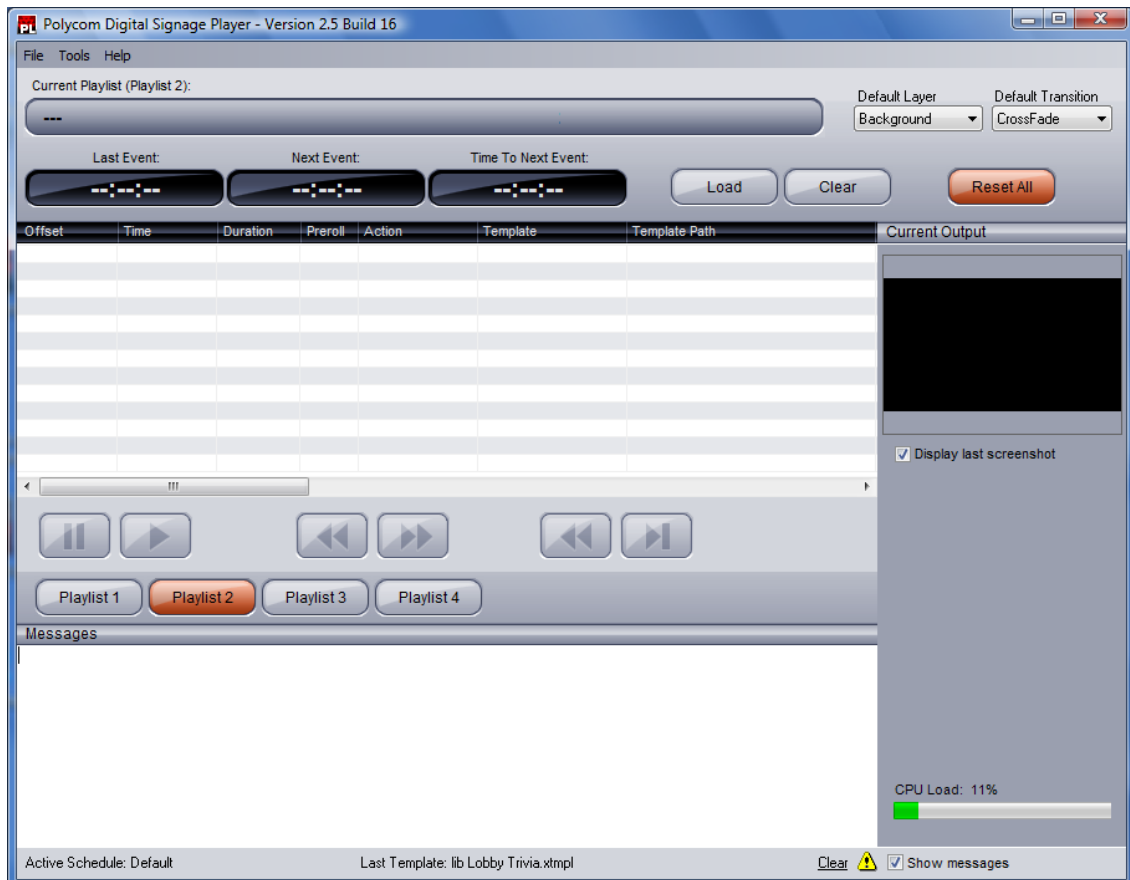
### Loading a Playlist

- 1 To load a PDS Playlist, in the PDS Player choose **File > Load Playlist...**
- 2 Browse to a PDS Playlist (.xplst) on your computer and choose **Open**.  
The playlist plays in the CG Rendering window.
- 3 To playback a PowerPoint slide in the PDS Player, with a PowerPoint presentation loaded, select a slide and choose **Tools > Render PowerPoint Slide**.

The slide plays in the CG Rendering window.

## The PDS Player Interface

The PDS Player is designed to facilitate the task of playing out either individual templates, playlists, or creating schedules of events.



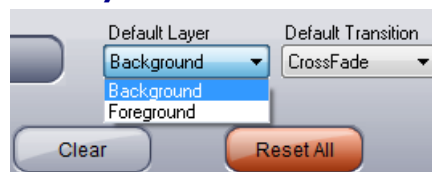
### Current Playlist

Displays the directory path and name of the currently active playlist.



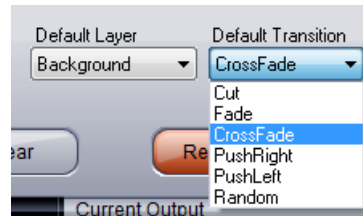
**NOTE:** Previously loaded playlists can be quickly loaded by clicking on the **Current Playlist** filename bar and choosing a playlist from the drop-down list that appears.

### Default Layer



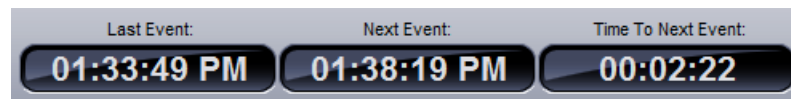
Specifies the rendering layer in which a template loads. Options available are **Background** and **Foreground**.

### Default Transition



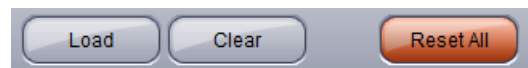
Specifies the default transition effect to be used in between templates loaded in a playlist. Transitions from which you can select include **Cut**, **Fade**, **Crossfade**, **Push Right**, **Push Left**, and **Random**.

### Events



- **Last Event:** The time of the last event loaded or executed in the Player.
- **Next Event:** The time of the next planned event to occur in the Player.
- **Time to Next Event:** Countdown timer of the next planned event to occur in the Player.

### Control Buttons









- **Load:** Opens a dialog box to load templates or playlist files.
- **Clear:** Removes the contents of a previously loaded playlist from the Player.
- **Reset All:** Clears the output of the CG rendering window.

### Playlist Controls

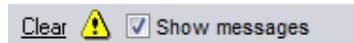
The PDS playlist controls are described as follows:



:

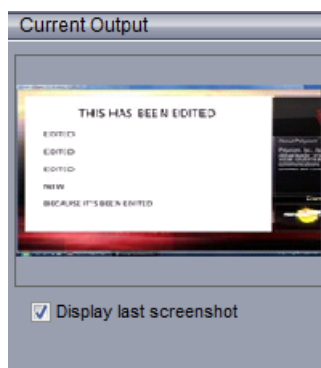
Button	Function
	Pauses the playback of the currently loaded playlist.
	When paused, resumes playback of the currently loaded playlist.
	Plays the previous event in the currently loaded playlist.
	Plays the next event in the currently loaded playlist.
	Jumps to the first event in the currently loaded playlist.
	Jumps to the last event in the currently loaded playlist.

## Message Control



- When **Show Messages** is enabled, displays messages from the PDS Player. The **Clear** button clears the contents of the Messages window.

## Current Output Window



- When **Enable Auto Screenshot** is enabled, displays a preview of the current output of the PDS Player.

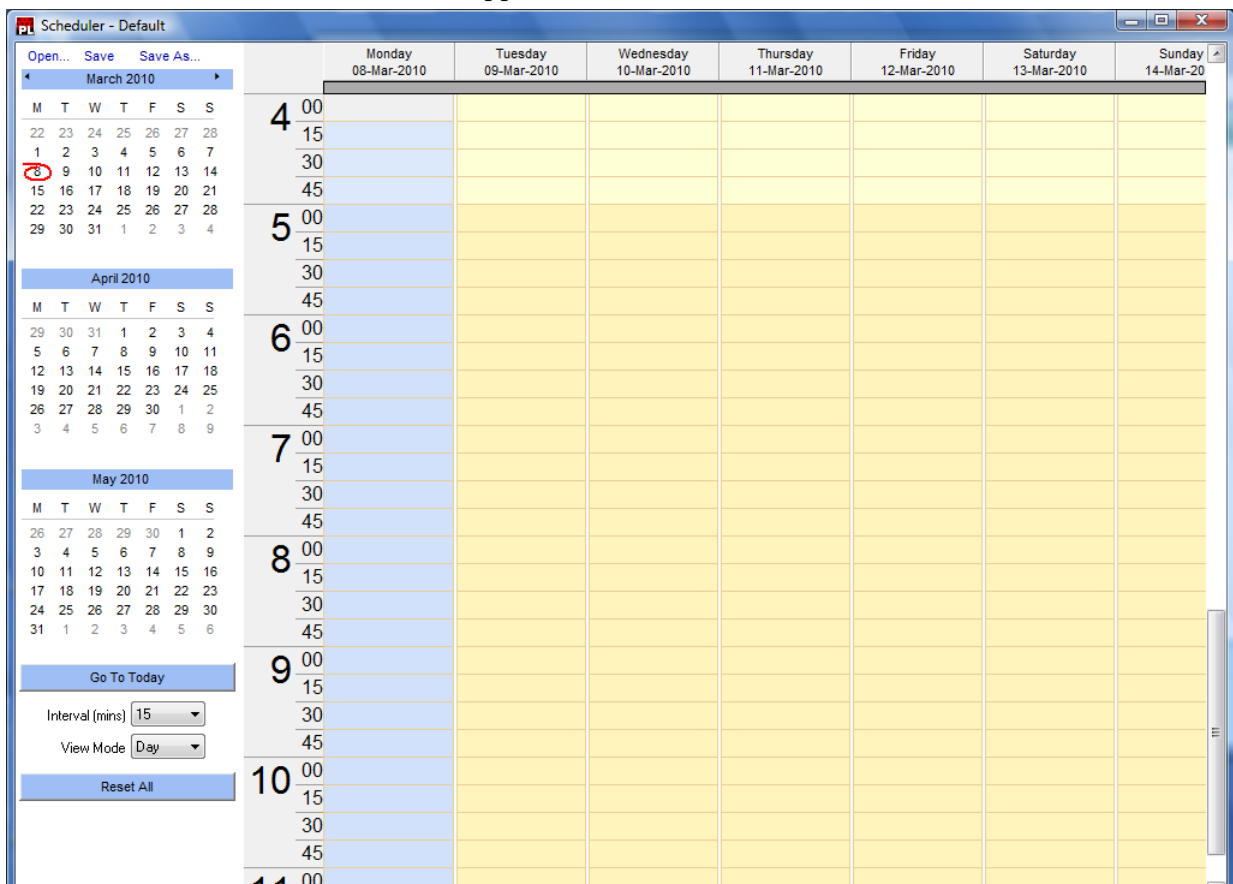
## Scheduling Events with the PDS Player

With the PDS Scheduler, you can create playout schedules for several different playlists, or assign PDS commands to occur at specific times throughout the day.

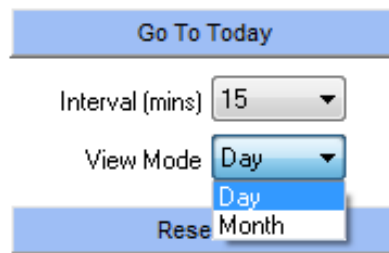
Schedules can also include control events, such as starting a crawling ticker on the output screen. This allows users in the central location to schedule any kind of control event by assigning the appropriate event in the schedule.

### To activate PDS Scheduler:

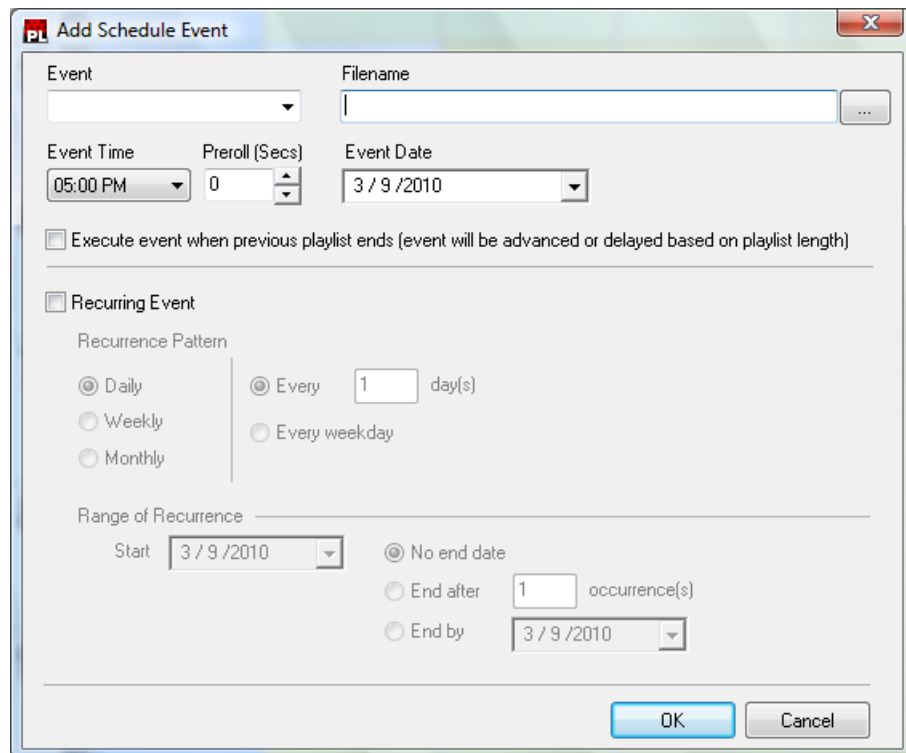
- 1 In the PDS Player, choose **Tools > Schedule....** The PDS Scheduler window appears.



- If the Schedule is presented by Month rather than Day, go to the View Mode box and select **Day**.



- In the Day view, right-click on the date and time at which to start playing the slideshow. From the Scheduler menu that appears, select **Add Event....** The Add Schedule Event dialog appears.



**4** In the Event box, select **Load Presentation**.

You can also select any of the following and schedule its payout:

**Load Presentation:** Schedules payout of a complete presentation.

**Load Slide:** Schedules payout of an individual slide. You must select the presentation and specific slide.

**Load Playlist:** Schedules payout of a playlist. Browse to select a playlist (.xplst) file.

**Execute Script:** Schedules when to execute a script (.xsc) file that controls a slideshow presentation for broadcast.

**Run Program:** Schedules when to launch an executable program.

**Unload All Presentations:** Removes any loaded presentations or slides that have been loaded into the PDS Player.

**Reset All:** Clears the output of the CG renderer.

**Unload and Reset All:** Removes any loaded presentations or slides that have been loaded into the PDS Player and clears the output of the CG renderer.

**5** In the Filename field, click **Browse** and select a presentation.

**6** If you want to change the time, in the **Event Time** box, set the time at which to start playing the presentation.

**7** In the **Preroll** box, set the number of seconds.

**8** Set the start date in the **Event Date** box.

**9** If you want to repeat the presentation payout, enable **Recurring Event**. The **Recurrence Pattern** options appear.

Recurring Event

Recurrence Pattern

Daily      Recur every  week(s) on

Weekly       Monday     Tuesday     Wednesday     Thursday

Monthly       Friday       Saturday     Sunday

Range of Recurrence

Start  ▼

No end date

End after  occurrence(s)

End by  ▼

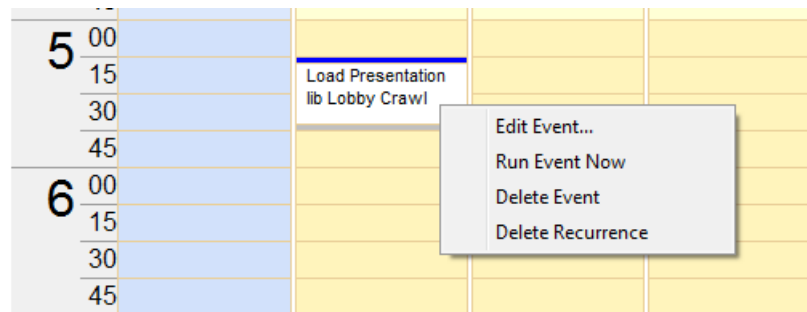
- 10** From the **Recurrent Pattern** options, set the frequency of recurrence. Choosing **Daily**, **Weekly**, and **Monthly** will appear.

Recurring Event  
 Recurrence Pattern  
 Daily  
 Weekly  
 Monthly  
 Day 1 of every 1 month(s)  
 The Second Tuesday of every 1 month(s)  
 Range of Recurrence  
 Start 3 / 9 / 2010  
 No end date  
 End after 12 occurrence(s)  
 End by 3 / 9 / 2010  
 OK Cancel

- 11** From the **Range of Recurrence** options, set start and end dates.
- 12** Click **OK**.
- 13** The scheduled presentation and any recurrences you specified appear in the PDS Scheduler calendar.

#### To delete a scheduled event:

- 1** In the PDS Scheduler, select the event you want to delete and right-click.



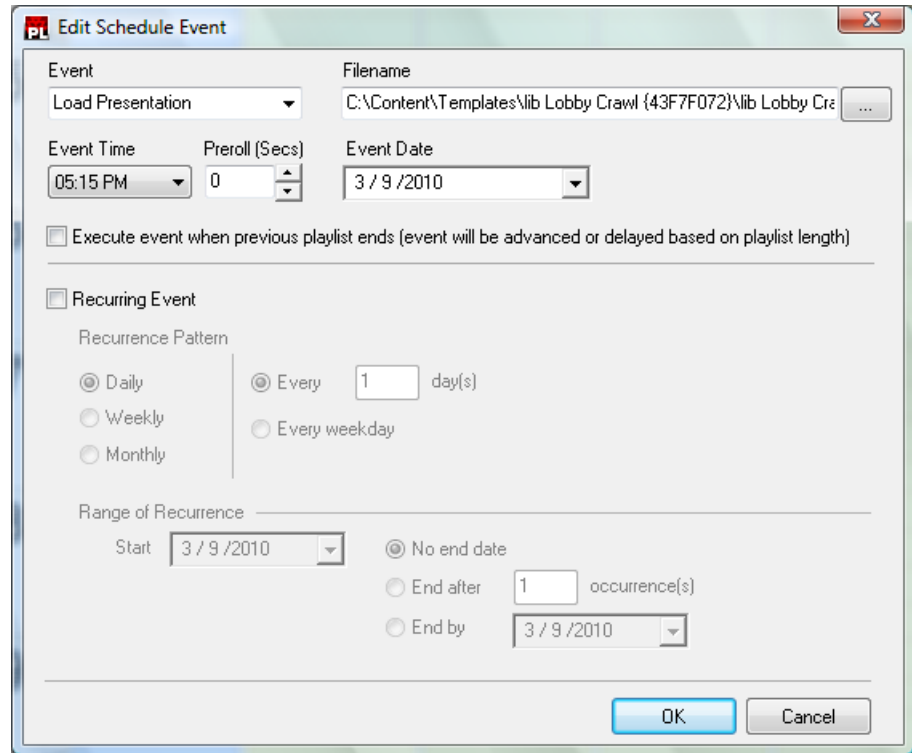
- 2** In the menu that appears, select **Delete Event**.

#### To delete a scheduled recurrence:

- 1** In the PDS Scheduler, select any one event from a recurrence you want to delete and right-click.
- 2** In the menu that appears, select **Delete Recurrence**.

**To edit a scheduled event:**

- 1 In the PDS Scheduler, select the event you want to edit and right-click.
- 2 In the menu that appears, select **Edit Event...** The Add Schedule Event dialog appears.

**To immediately execute a scheduled event:**

- 1 In the PDS Scheduler, select the event you want to execute and right-click.
- 2 In the menu that appears, select **Run Event Now**.

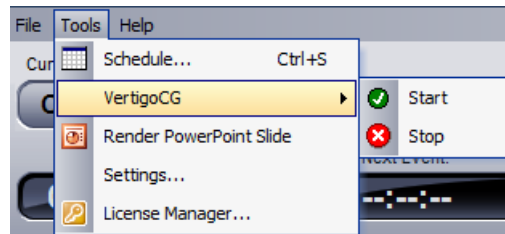
**To save and activate a schedule:**

- 1 In the PDS Scheduler, click **Save As...**
- 2 In the **Save As** dialog box, provide a name for the schedule and choose **Save**.
- 3 The name of the schedule appears at the bottom of the PDS Player next to **Active Schedule**.

## Controlling the VertigoCG Renderer

The PDS Player lets you gain access to the CG rendering engine directly. This lets you start and stop the CG as desired.

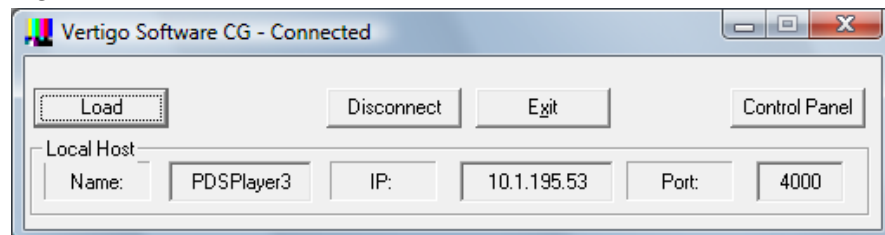
**To start and stop the VertigoCG, do the following:**



- 1 In the PDS Player, choose **Tools > VertigoCG > Start**.
- 2 The CG rendering window appears.
- 3 When ready to stop the CG rendering engine, choose **Tools > VertigoCG > Stop**.
- 4 The CG rendering window disappears.

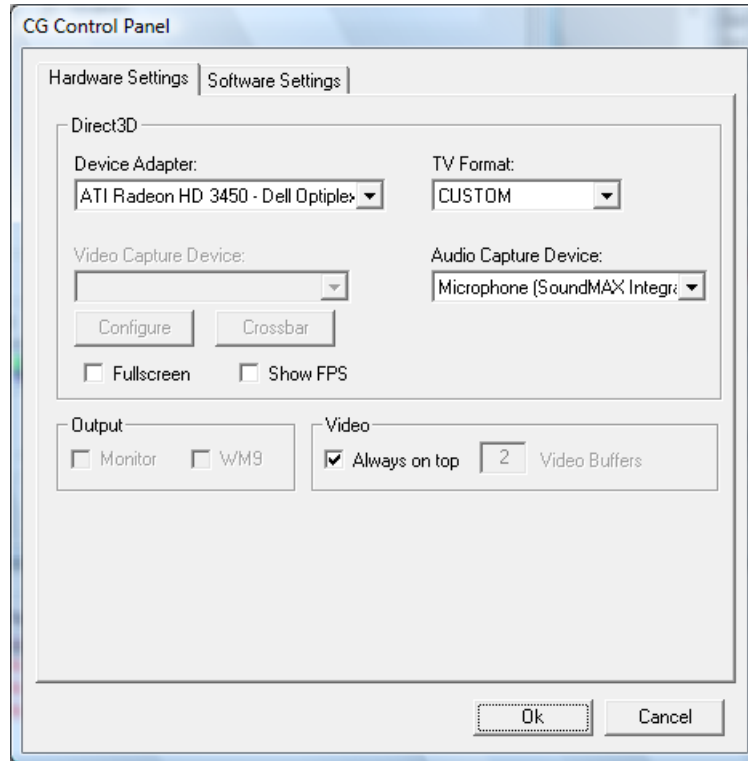
### Using VertigoCG

The VertigoCG renderer allows direct configuration via a control interface, if enabled in the PDS Player Renderer Settings. When the VertigoCG rendering engine launches, a small interface launches.



- 1 The **Load** feature allows you to directly load .xml files in the CG Renderer.
- 2 Click **Disconnect** to disconnect the renderer from the Player.
- 3 Click **Exit** to close the Renderer.

#### 4 Click **Control Panel** to launch the VertigoCG Control Panel.



**Hardware Settings** allow users to choose a video card device for output, select video and audio capture devices, whether to display the Renderer in full screen or in a moveable window, the TV output format (NTSC, PAL, etc.), and whether to display FPS along with the output.

Under **Output**, users can choose to view the output in Monitor or Windows Media 9 formats, if possible.

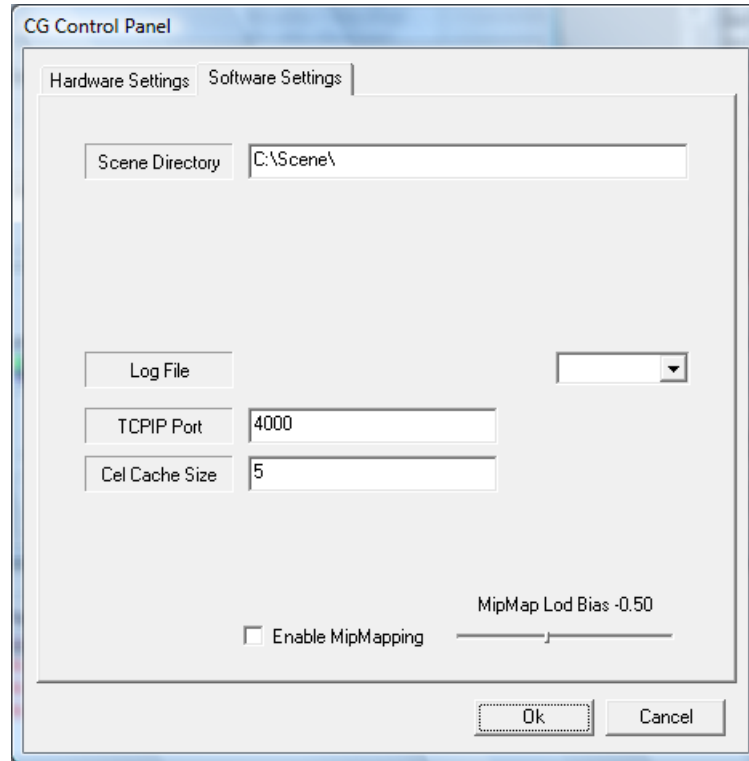
Under **Video**, users can choose whether to display Video on top and how many Video Buffers are present.



**NOTE:** The default PDS Player does not support changes in the hardware settings of the VertigoCG Renderer. Please contact Polycom Support before making any changes.



**5** The **Software Settings** tab provides another set of configuration options.



Users can change the scene directory, dictate a log file, change the TCPIP Port for the CG Renderer, change the Cel Cache Size, and enable MipMapping, a faster but more memory-intensive form of rendering. If MipMapping is enabled, users can adjust the negative level of detail bias.



**NOTE:** The default PDS Player does not support changes in the software settings of the VertigoCG Renderer. Please contact Polycom Support before making any changes.

**6** When configuration has been completed, click **OK**. Click exit on the VertigoCG interface and reopen it.



**NOTE:** Changes made in the VertigoCG settings do not apply across PDS Player sessions and will be lost if the PDS Player application is closed and reopened.



# Using the Remote Manager

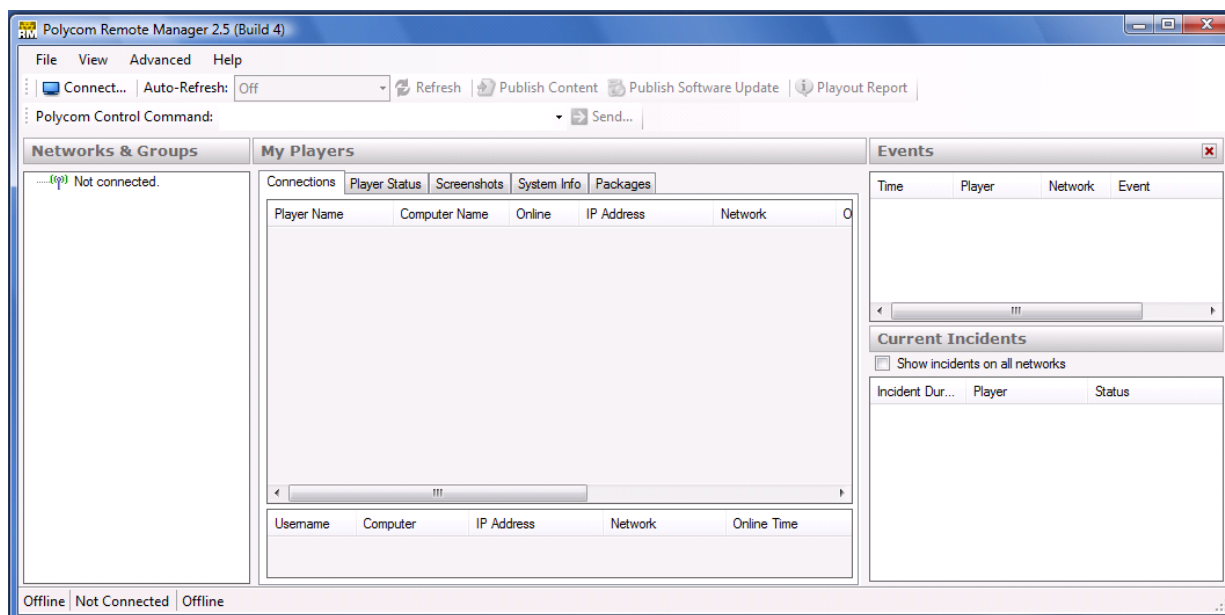
This chapter explains the interface and use cases for the Polycom Digital Signage Remote Manager. The installation of the Remote Manager is detailed in the *Polycom Digital Signage Server Getting Started Guide*.

This chapter contains the following sections:

- [Main Window](#)
- [Tool Bar](#)
- [Network and Groups Pane](#)
- [Remote Player Management Console](#)

## Main Window

The PDS Remote Manager interface consists of the toolbars and four panes, as shown in the image below:



The toolbars provide the buttons used for a number of high-level operations within PDS Remote Manager. Most other operations are available through dialog boxes that will be displayed (e.g., on a Player name or thumbnail image).

## Networks and Groups Pane

The Networks & Groups pane shows a tree view of the hierarchy of networks and groups you can manage that are running on the PDS Server. Each network contains one or more groups (which may in turn have sub-groups).

The Network pane shows the Players defined within the network or group that is currently selected in the Networks & Groups pane. All the Players that are defined in the network or group will be shown, whether they are currently online or offline.

The Network pane has five tabs, allowing you to manage different aspects of these Players' operations:

- The **Connections** tab shows you the Players that are currently connected to the PDS Server (online) as well as those offline Players that have been connected recently. The Player list is tabular, and you can select the sorting order for the list by clicking a field heading.
  - In the lower portion of the pane, the Connections tab will show you the list of users currently connected to the PDS Server.
- The **Player Status** tab relates information on Player connectivity.
- The **Screenshots** tab shows thumbnail views of the screenshots from the Players in the selected network or group. These thumbnails are refreshed regularly and will show the output from the Player as taken from the computer's graphics card. (The thumbnail refresh interval is set by the Auto-Refresh menu in the toolbar.)
- The **System Info** tab provides some basic system information, such as software and operating system versions, for each Player.
- The **Packages** tab shows the file download packages that have been defined for the selected network.

## Events Pane

The **Events** pane shows a table of recent system events on the Players in the selected network, much like a shared log file. The most recent events will appear at the top of the table.

## Current Incidents Pane

The **Current Incidents** pane shows the actual log messages from PDS Server and the PDS Remote Manager. The events shown here are all major and minor log messages from the Polycom PDS Server and the PDS Remote Manager, including the events shown in the Events pane.

## Status Bar

Finally, the status bar (at the very bottom of the PDS Remote Manager window) shows you the current status of PDS Remote Manager, indicating:

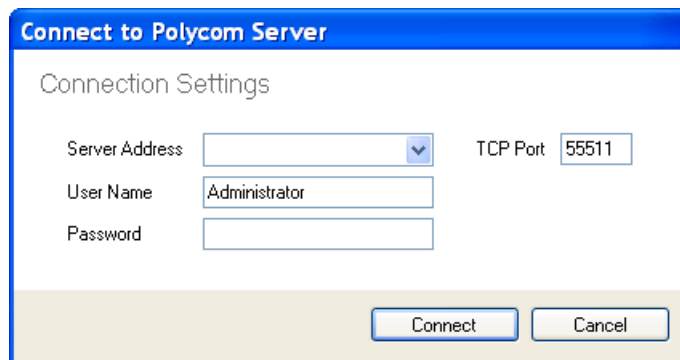
- the name of the PDS Server;
- the number of Players and managers currently connected to the PDS Server; and
- the name of your currently selected network.

In addition to the PDS Remote Manager main window shown here, PDS Remote Manager will bring up smaller windows for specific tasks, such as managing a Player or creating a file package. The PDS Remote Manager main window will still be available while the task windows are open.

## Tool Bar

### Connect/Disconnect

The **Connect.../Disconnect** button allows you to connect PDS Remote Manager to a PDS Server and to disconnect from the Server. Clicking **Connect** brings up the following dialog:



The dialog box is titled "Connect to Polycom Server" and is labeled "Connection Settings". It contains the following fields:

- Server Address: A dropdown menu.
- TCP Port: A text box containing the value "55511".
- User Name: A text box containing the value "Administrator".
- Password: An empty text box.

At the bottom right of the dialog, there are two buttons: "Connect" and "Cancel".

The default User Name/Password credentials are Administrator / Polycom123.

## Auto-Refresh Menu

The Auto-Refresh menu allows you to select the interval at which the status information in Remote Manager is refreshed. This includes refreshing the screenshots as well as all other system information displayed in the different tabs in the Network pane.



**NOTE:** Please remember that each refresh requires data, including a screenshot image, to be sent from the Player system to the PDS Server and then from the PDS Server to your PDS Remote Manager. When managing a medium-sized or large network of Players, you can create a high level of network traffic and risk overloading your network simply by making your refresh interval too short.

## Refresh

Click **Refresh** to refresh the network information and screenshots manually. This button is particularly useful when the Auto-Refresh interval is set to **Off**.

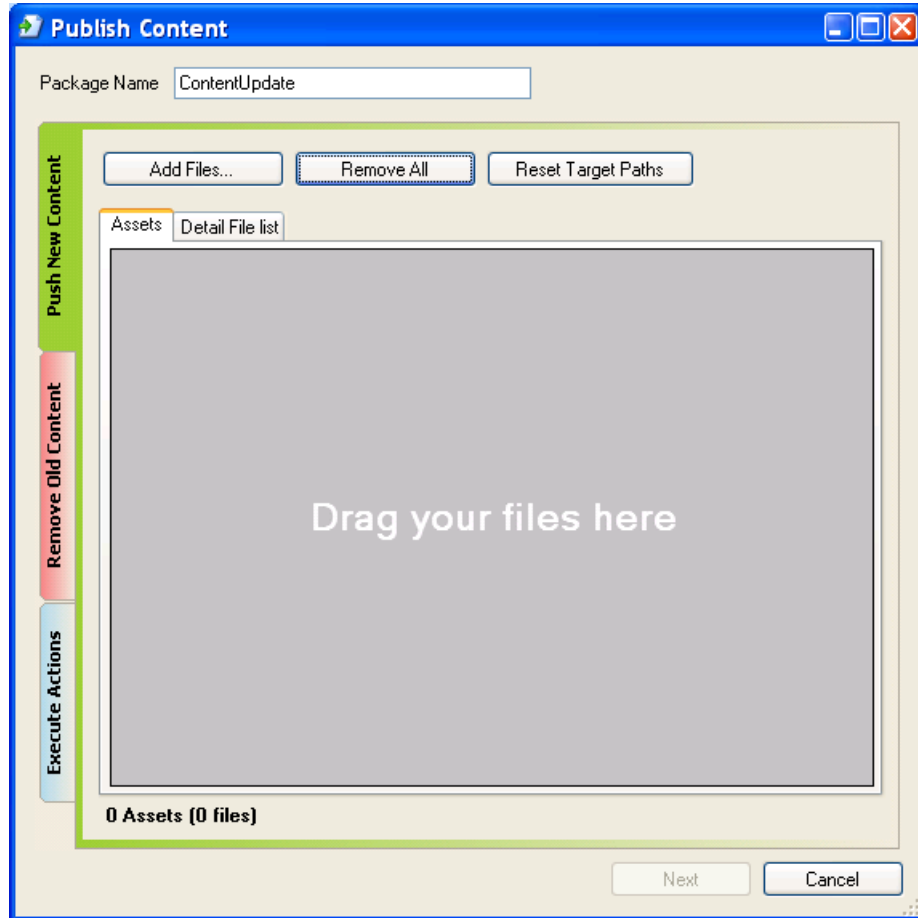
## Publish Content

The PDS Remote Manager includes a Publish Content dialogue. This tool is used to move content packages to PDS Player systems. Please note that, in most implementations, content updates will be performed through the PDS Web Controller rather than the Remote Manager.

The Remote Manager communicates directly with remote Players through the PDS Server. The publication process performs an inventory check against contents stored on remote Players. If content is missing, the Remote Manager creates a package to transfer to the Players. A package is a compressed archive containing all assets missing from the remote Player as well as all content added through the Publish Content tool.

## Publish New Content

Click **Publish Content** to bring up the Publish Content dialog. The dialog has a Package Name field at the top (enter the name of your content package here) and three tabs in the main section:

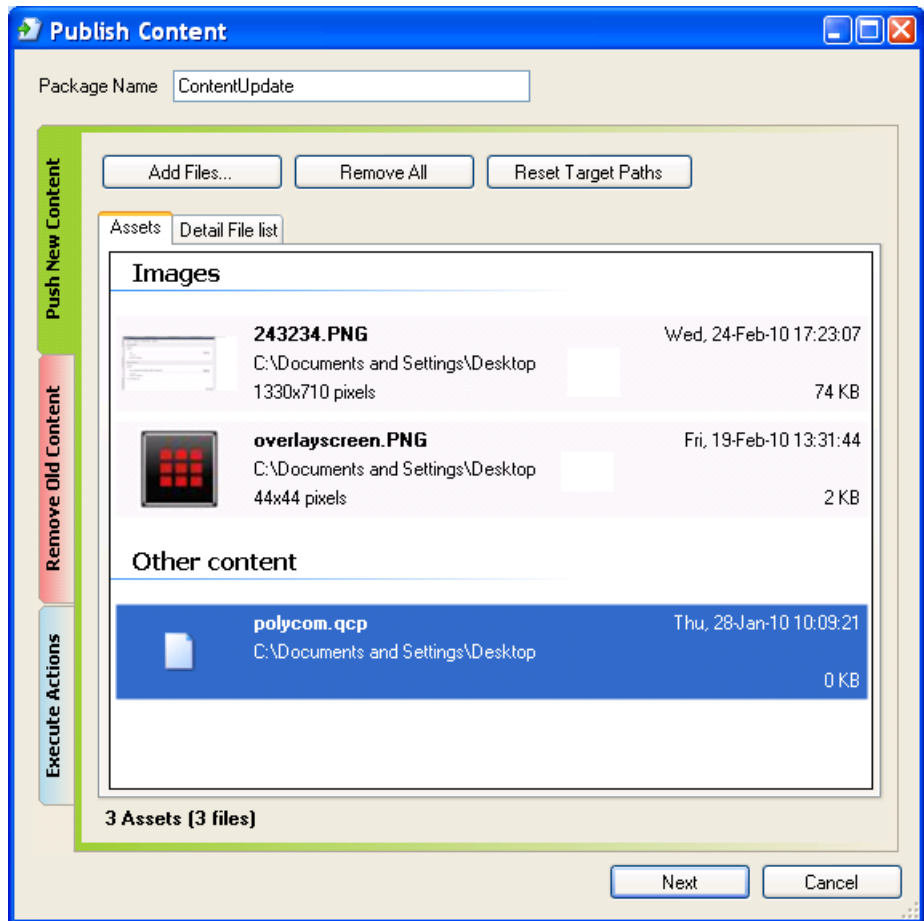


### To publish content:

- 1 Click **Add Files...** to select files from your computer to be added to the package. You may select multiple files in the file browser by holding down Shift and clicking the file icons.

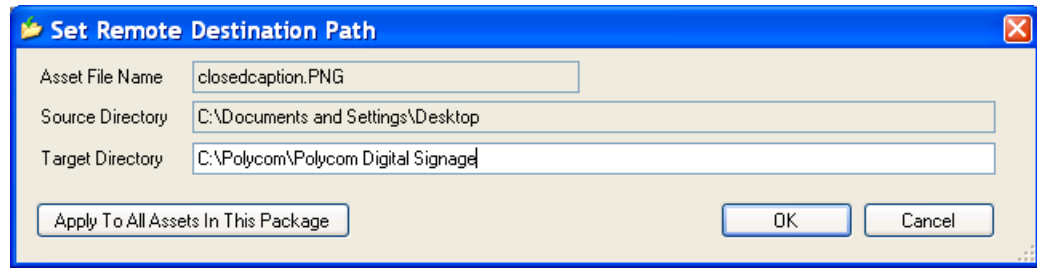
In the Assets view, you may also drag and drop the files you wish to publish.

- a The **Assets** tab and the **Detail File List** tab allow you to select from two different views of the list of files in the package.



- 2 Click **Remove All** to remove all of the assets from the package. (Select an asset and press the **Delete** key to remove only one asset from the package.)
- 3 Click **Reset Target Paths** to reset the destination paths for all assets back to their default values.
- 4 To set individual destination paths, use the **Assets** view. The **Assets** view shows a small thumbnail image and size/resolution information. Right-click on an asset to bring up a context menu. Select **Change Target Path...** to bring up the **Set Remote Destination Path** dialog box:
- 5 In the dialog box, enter the destination directory for the selected asset. You may then click **Cancel**, click **OK** to apply the change only to the selected asset, or click **Apply to All Assets In This Package** to apply the change to all the assets in the package.
- 6 The **Detail File List** view shows more details, similar to the **Details** view in the **Windows Explorer**; click a column heading to sort by that column.

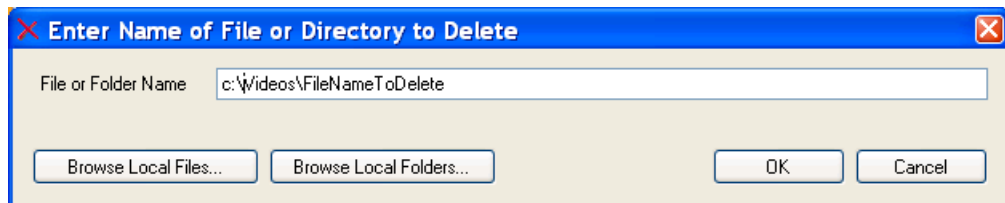




## Remove Old Content

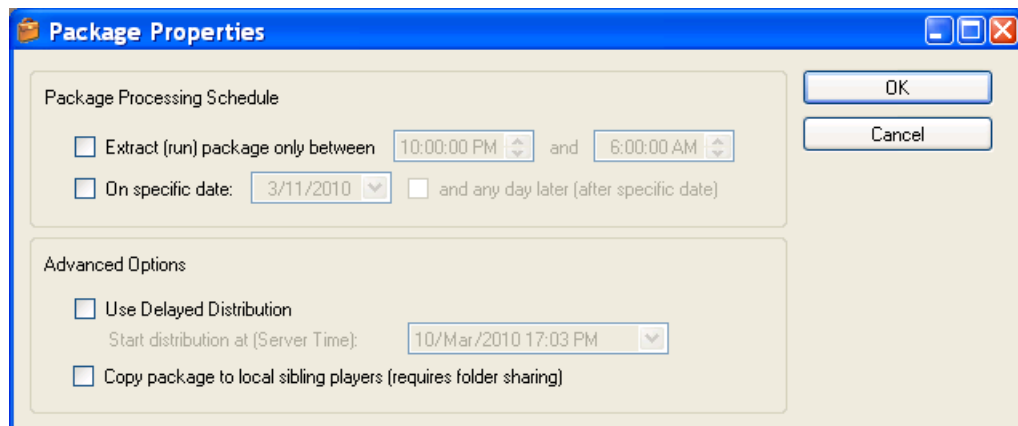
If there is old content to be removed from the Players receiving the package, you can specify the file names for the old content in the **Remove Old Content** tab.

Click "Add Files" to add files to the removal list and bring up the deletion dialog:



## Execute Actions

After you have selected your assets and made any required changes to the destination paths, click **Next** to bring up the Package Properties dialog:

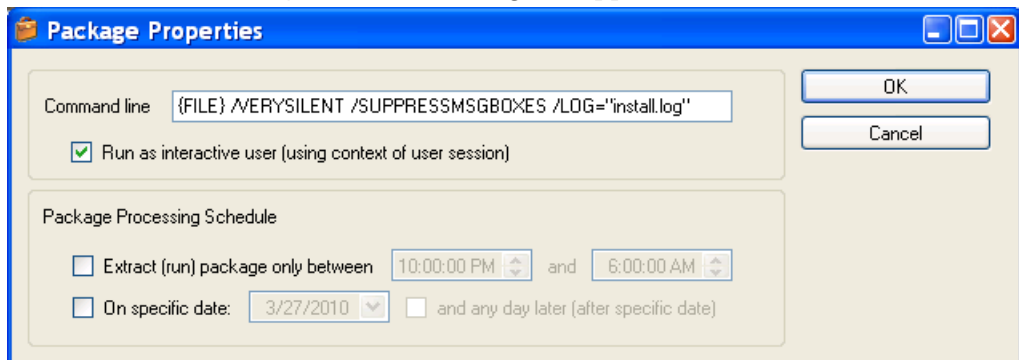


## Publish Software Update

Polycom Digital Signage Remote Manager can be used to publish routine software maintenance updates to the network of Players.

### To publish a software update:

- 1 Click **Publish Software Update**.
- 2 The **Open Executable File** dialog will appear. Choose a file and click **Open**.
- 3 The **Package Properties** dialog will appear.



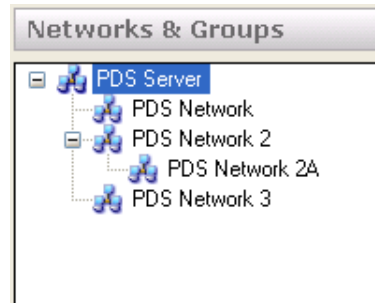
If you wish to designate a specific timeframe in which to extract the package after publishing, do so in the **Package Processing Schedule** area.

The **Command line** should not be altered from the default.

- 4 Click **OK**. The Package will be compressed and published.
- 5 Consult the Events tab to ensure that the package has published and run.
- 6 Upon installing a software update, the PDS Player application will not automatically relaunch. Access the PDS Player via RDP and relaunch the Player application manually, or enter **RESTART** in the command space in Remote Manager and direct it to the Player.

## Network and Groups Pane

The Networks & Groups pane shows a tree view of the hierarchy of networks and groups of Players managed by the PDS Server. The network or group you select here will select the Players shown in the Network pane and the operations performed on those Players.

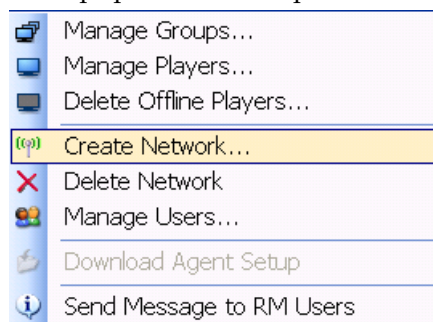


If you select a network or group which contains sub-networks or subgroups, then the Network pane will show the Players in the selected group as well as the Players in all its sub-networks and subgroups.

The title of the Network pane will change to show the name of the selected network and the selected group (if any).

## Network and Player Management

The Network and Groups Pane is the main interface for network and player management. Right-clicking a network, group, or server in the Network and Groups pane will call up the following context menu:



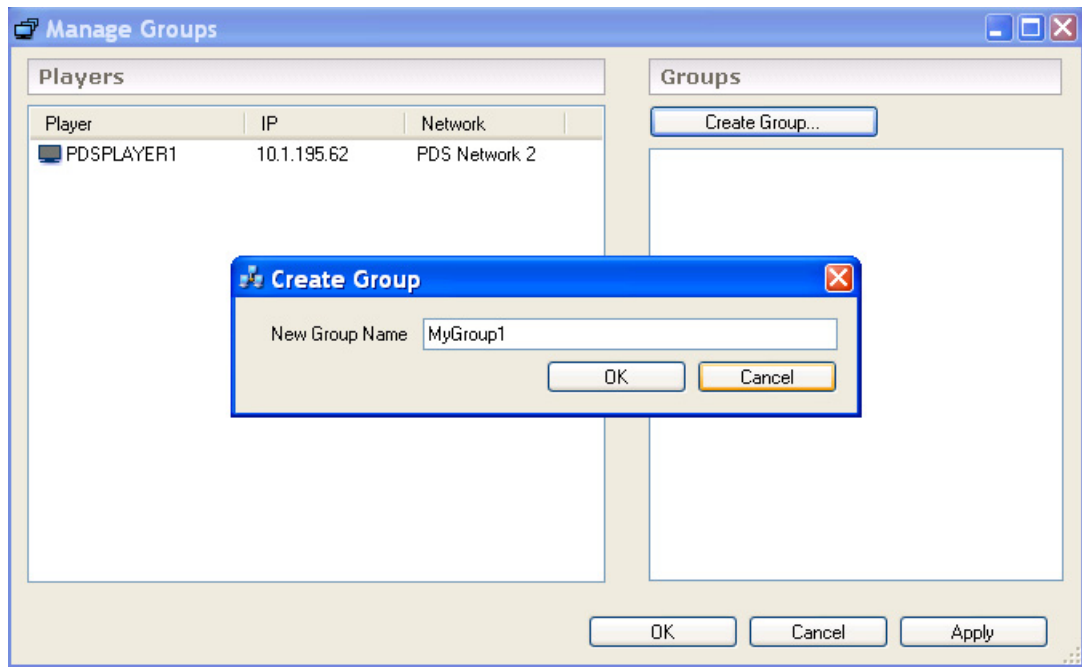
The following sections will explain each function within this context menu.

### Manage Groups

The Polycom Digital Signage solution offers two forms of hierarchical organization for players: networks and groups. Each player is associated with only one network or subnetwork. User permissions are determined by network: networks can have unique administrators, agents, and content

managers. One potential use case for multiple networks is for an organization with multiple geographic locations and unique content managers for each location.

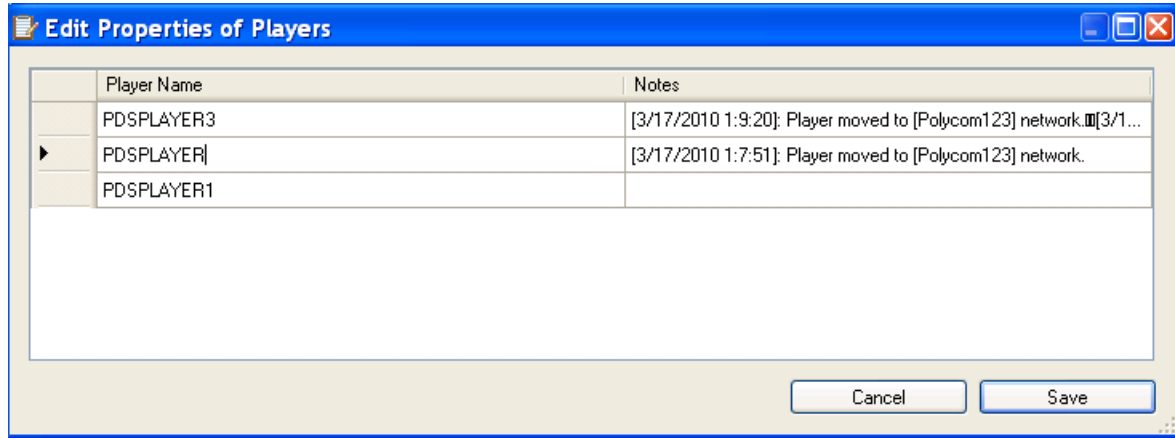
Groups can incorporate players across multiple networks. Players can also be associated with multiple groups. Groups could be useful for an organization with multiple player roles -- internal, customer-facing, marketing-driven, and news-driven players could be grouped across networks and receive massed content updates.



- 1 Right click on a Server, Network, or subnetwork in the Networks and Groups Pane. Select **Manage Groups** from the context menu.
- 2 The **Manage Groups** window will appear.
- 3 Click **Create Group**. Name the group and click **OK**.
- 4 Drag and drop the PDS Players you wish to include in the group.
- 5 If you wish to delete or rename a group, right-click on the group.
- 6 Click **Apply** and **OK**. The groups you have created (and any changes you have made to the groups) should appear in the Networks and Groups pane.

## Manage Players

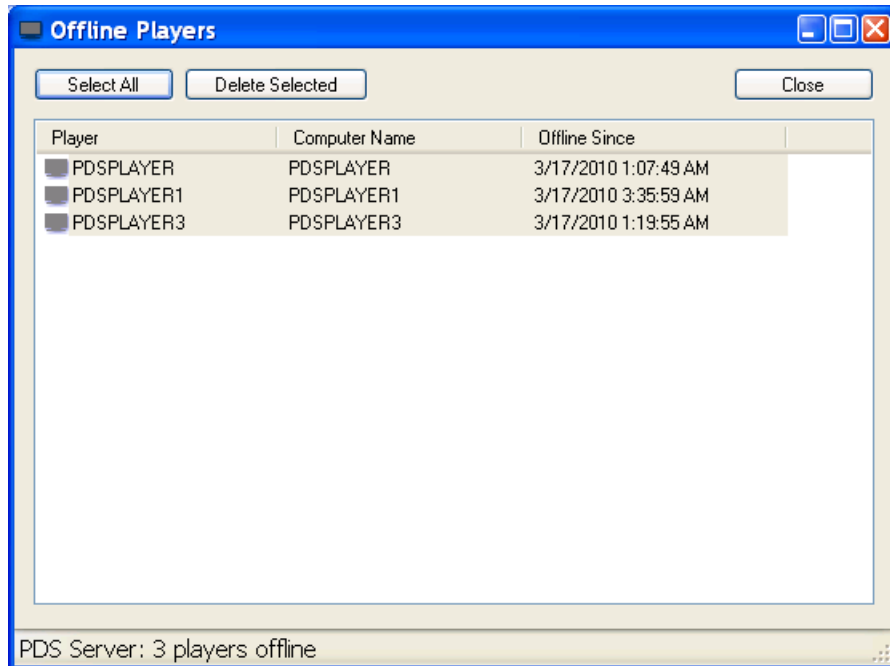
The Networks and Groups Pane allows direct configuration changes to the Players on a Server.



- 1 Right click on a Server, Network, or subnetwork in the Networks and Groups Pane. Select **Manage Players** from the context menu.
- 2 The **Edit Properties of Players** menu will appear.
- 3 Click within the Player Name region to edit the name of a given PDS Player.
- 4 The Notes section automatically records recent network changes for each player; this section can be user-edited.
- 5 Click **Save**.

## Delete Offline Players

Offline Players can be deleted individually by right-clicking on the Player in the Connections tab of the Network pane. Alternatively, selecting **Delete Offline Players** will delete all offline Players in a network. Please note that online Players cannot be deleted.



- 1 Selecting the **Delete Offline Players** dialogue will launch the Offline Players menu.
- 2 All Players not currently connected to the PDS Server, or Players that have been removed from a given Network or subnetwork, will appear in the Offline Players dialogue.
- 3 Select the Players you wish to delete and click **Delete Selected** to remove them from the Remote Manager interface. Please note that when reconnected these Players will reappear in the Remote Manager.
- 4 Click **Close** when completed.

## Create New Network

New Networks can be created by right-clicking on a Server in the Remote Manager. Subnetworks can be created by right-clicking on a Network.

- 1 Right click on a Server, Network, or subnetwork in the Networks and Groups Pane. Select **Create Network** from the context menu. The **Create New Network** window will appear.
- 2 Provide a **Name** and optional **Network Description**.
- 3 If you wish to designate a unique administrator for the Network, check **Create user account for network administrator**.  
Provide login credentials and a default email for this administrator.
- 4 Click **OK** to complete.
- 5 To associate players with a network, drag them from the **Connections** tab of the **Network** pane into the given network or subnetwork.
- 6 A warning will appear; click **OK**.

## Delete Network

To delete a Network, right-click on the Network and select **Delete Network**. Click **Yes** on the warning that appears.



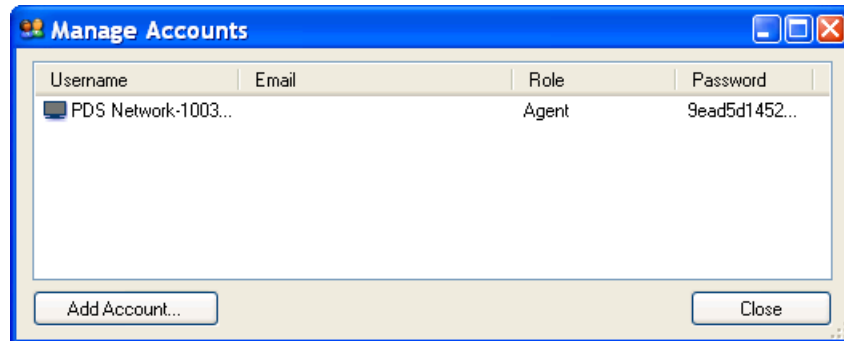
**NOTE:** The following cannot be deleted through the Remote Manager:

- The PDS Server
- Networks with subnetworks
- Networks with players associated (including greyed-out moved or disconnected players)

Delete subnetworks and move or delete all players before deleting a network.

## Manage Users

- 1 Right click on a Server, Network, or subnetwork in the Networks and Groups Pane. Select **Manage Users** from the context menu.
- 2 The **Manage Accounts** window will appear.



- 3 To delete an account, right-click on the username and select **Delete Account**.
- 4 Click **Add Account** to create a new account, or double-click on an existing account to edit the properties.



**NOTE:** The properties of the default Agent for each network cannot be changed, although they can be viewed. A new Agent can be created if you wish to change the Agent properties.

- 5 The **Create New Account** window will appear.

- 6 Choose whether the account will be a **Player Agent**, **Network Administrator**, or a **Content Manager**.
  - The **Player Agent** is the link between Players and the Server. It enables network status and health monitoring.

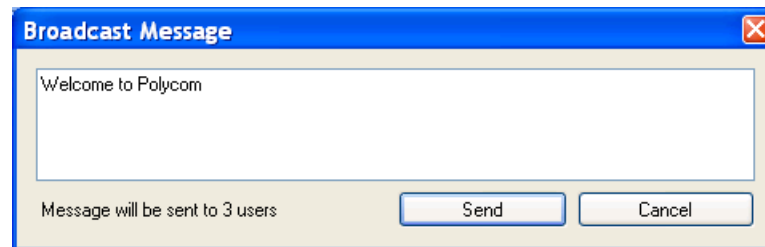


- The **Network Administrator** oversees all configuration on a given network via the Remote Manager, as well as all content oversight abilities.
  - The **Content Manager** has content update privileges on a given network via the Web Controller; the Content Manager can log into but make no changes in the Remote Manager.
- 7 Provide an email address and login credentials.
  - 8 Click **OK**.

## Download Agent Setup

Select **Download Agent Setup** if you wish to download the Agent for a particular network. Agent downloads should not be necessary in the default configuration of the PDS Server. Please consult [Non-Standard Installations](#) on page 159.

## Broadcast Message



Administrators can broadcast a message to all Remote Manager users. To directly communicate with one user, see [Manager List](#) below.

# Network Pane

The Network pane shows different properties of the Players that are in the network or group selected in the Networks & Groups pane.

Network: PDS Server

Connections | Player Status | Screenshots | System Info | PDS Server - network packages

Player Name	Computer Name	Online	IP Address	Online Since	ID	Version	Offline ...
PDSPLAYER2	PDSPLAYER	no	10.1.195.62	1/29/2010 1:53:48 AM	8AB62B19864C	2.5.4.9	1/30/2...
PDSPLAYER3	PDSPLAYER	no	10.1.195.35	3/2/2010 1:23:49 AM	27B172394FAE	2.5.4.9	3/2/20...
PDS-SH-01	PDS-SH-01	no	10.1.195.21	1/29/2010 3:27:32 AM	990C6817E078	2.5.4.9	1/29/2...
PDS-SH-02	PDS-SH-02	no	10.1.195.107	1/29/2010 3:01:34 AM	B39151CD04AB	2.5.4.9	1/29/2...
PDS-SH-03	PDS-SH-03	no	10.1.195.110	1/29/2010 3:18:07 AM	CE6808715934	2.5.4.9	1/29/2...
PDS-GD-PC	PDS-GD-PC	no	10.1.195.155	12/9/2009 3:06:56 PM	56CE723A1659	2.5.4.9	12/10/...
PDSPLAYER1	PDSPLAYER1	yes	10.1.195.53	3/3/2010 3:52:26 AM	C79EBECB1769	2.5.4.9	

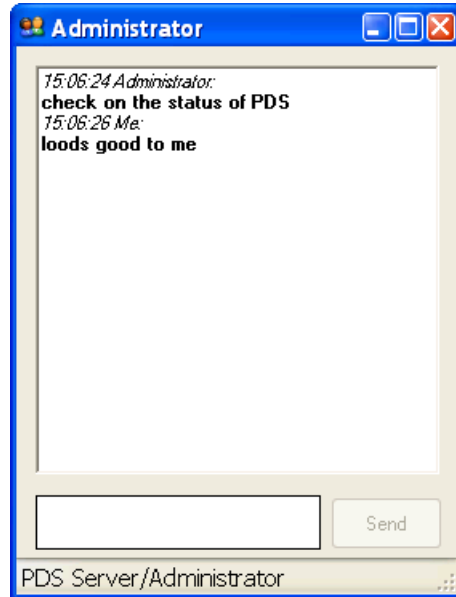
Username	Computer	IP Address	Network	Online Time	ID	Version
Administrator	RUSLAN-T60		PDS Server	3/4/2010 2:06:42 AM	27452a	2.5.4.12
Administrator	RUSLAN-T60		PDS Server	3/4/2010 3:05:51 AM	f59857	2.5.4.12

## Manager List

Username	Computer	IP Address	Network	Online Time	ID	Version
Administrator	RUSLAN-T60		PDS Server	3/4/2010 2:06:42 AM	27452a	2.5.4.12
Administrator	Admin		PDS Server	3/4/2010 3:05:51 AM	f59857	2.5.4.12

A list of managers appears below the Player list in the Network Pane. Details about managers currently online are visible here.

Double-clicking a manager's username launches a chat pop-up:



## Connections

Network: PDS Server								
Connections								
Player Name	Computer Name	Online	IP Address	Online Since	ID	Version	Offline ...	
PDSPLAYER2	PDSPLAYER	no	10.1.195.62	1/29/2010 1:53:48 AM	8AB62B19864C	2.5.4.9	1/30/2...	
PDSPLAYER3	PDSPLAYER	no	10.1.195.35	3/2/2010 1:23:49 AM	27B172394FAE	2.5.4.9	3/2/20...	
PDS-SH-01	PDS-SH-01	no	10.1.195.21	1/29/2010 3:27:32 AM	990C6817E078	2.5.4.9	1/29/2...	
PDS-SH-02	PDS-SH-02	no	10.1.195.107	1/29/2010 3:01:34 AM	B39151CD04AB	2.5.4.9	1/29/2...	
PDS-SH-03	PDS-SH-03	no	10.1.195.110	1/29/2010 3:18:07 AM	CE6808715934	2.5.4.9	1/29/2...	
PDS-GD-PC	PDS-GD-PC	no	10.1.195.155	12/9/2009 3:06:56 PM	56CE723A1659	2.5.4.9	12/10/...	
PDSPLAYER1	PDSPLAYER1	yes	10.1.195.53	3/3/2010 3:52:26 AM	C79EBECB1769	2.5.4.9		

The Connections tab shows a table with one row for each Player. The table columns show the following information for each Player:

- Name
- Online status
- IP address
- Network
- Date and time it came online
- System ID
- Number of dropped connections
- Player (agent) version number

- Date and time the Player was last online (for offline Players)



Note:

- The name in the network column indicates the network to which the Player belongs, which is useful when you have selected a network or group that contains sub-networks or subgroups.
- Players that are currently offline will be shown as dimmed, i.e., the text of their table row will be a light gray color, and you will not be able to perform most operations on them.
- You can sort the table entries by clicking any of the column headings. PDS Remote Manager will initially sort the table by Player name.

To bring up the PDS Remote Player Management Console, double-click the Player's row in the table.

## Player Status

Like the Connections tab, the Player Status tab presents a table of the Players in the selected network, but with different columns of data to show status information for the PDS Player software and the computer.

Player Name	Status	Self...	Playlist
 PDSPLAYER	On-Air: Good	yes	Maste
 PDSPLAYER1	no video; CG down; XCommander do...	no	Maste

The columns in the table show the following information for each Player:

- Name
- PDS Player status
- Self-healing setting
- Currently running playlist
- Current event number within the current playlist
- Windows page file size
- Virtual memory used by the CG (Player graphics application)
- Virtual memory used by the PDS Player application
- Total disk usage on the system
- Master volume level for the audio output
- Time stamp (in Player local time) of the last status information sent to PDS Server
- Time stamp (in Player local time) of the last Player "heartbeat" seen by the agent

- Time stamp (in Player local time) of the last screenshot sent to PDS Server
- The full Windows file path of the currently running playlist

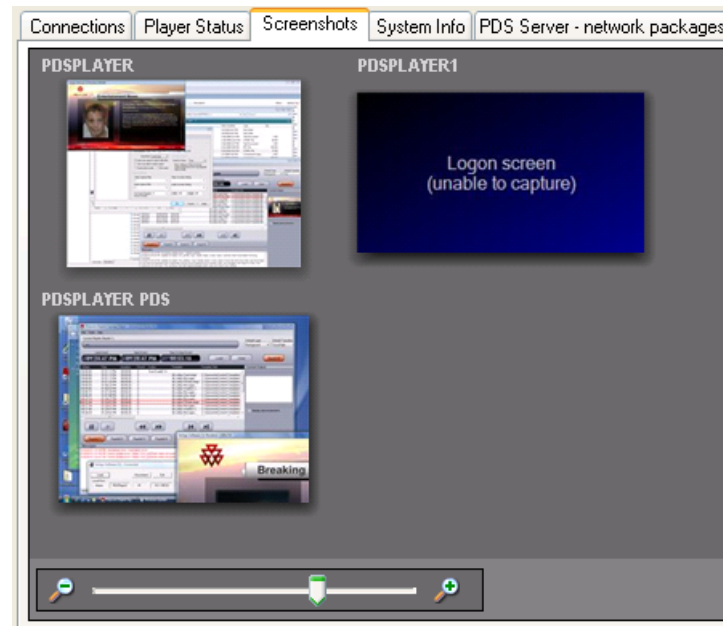
Please note that:

- Players that are currently offline will be shown as dimmed, i.e., the text of their table row will be a light gray color, and you will not be able to perform most operations on them.
- You can sort the table entries by clicking any of the column headings. PDS Remote Manager will initially sort the table by Player name.

To bring up the Remote Player Management Console, double-click the Player's row in the table.

## Screenshots

The Screenshots tab displays still images of each Player's output as rendered by the graphics card on the system. The screenshots are updated at a regular interval (based on the Auto-Refresh setting in the toolbar), so watching the images in the screenshots provides a quick and effective way to check the output from the Players in the network.



Each screenshot is captioned, with the name of the Player and network shown immediately above the screenshot image.




You can adjust the size of the screenshot images shown in this view using the zoom slider immediately below the screenshot viewing area.

You can select the monitor whose image is used for the screenshots by selecting from the pop-up menu immediately below the screenshot viewing area. You can select PDS Output Screen (this is the default option), System Primary Screen, or System Secondary Screen. (Note that if you select System Secondary Screen, Remote Manager will show a blank blue screen for all Players that have a single-monitor configuration.)

To bring up the Remote Player Management Console, double-click the Player's screenshot image.

## System Info

Like the Connections and Player Status tabs, the System Info tab presents a table of the Players in the selected network, but with different columns of data to show detailed system status information for the computer.

Computer Name	Time Zone	Player Name	Datapar...	Data...	DP ID	Heartbeat...	Package ...
 PDSPLAYER	Pacific Standard...	PDSPLAYER		0	7082...	2.5.4.9	2.5.4.9
 PDSPLAYER1	Eastern Standar...	PDSPLAYER1		0	1374...	2.5.4.9	2.5.4.9
 PDSPLAYER3	Pacific Standard...	PDSPLAYER3		0	7082...	2.5.4.9	2.5.4.9

The columns in the table show the following information for each Player:

- Computer name (as configured in the Windows "System Properties" control panel)
- Time zone (as configured in the Windows "Date and Time" control panel)
- Player name
- PDS Server version number
- Days remaining in the PDS Player license (for temporary licenses)
- PDS Player Product ID (for licensing)
- Data Parser version (if PDS Data Parser is installed)
- Days remaining in the Data Parser license
- Heartbeat Server version number
- Package Handler version number
- Operating system version (see note below)
- Operating system "uptime" (i.e., time since the last system reboot)

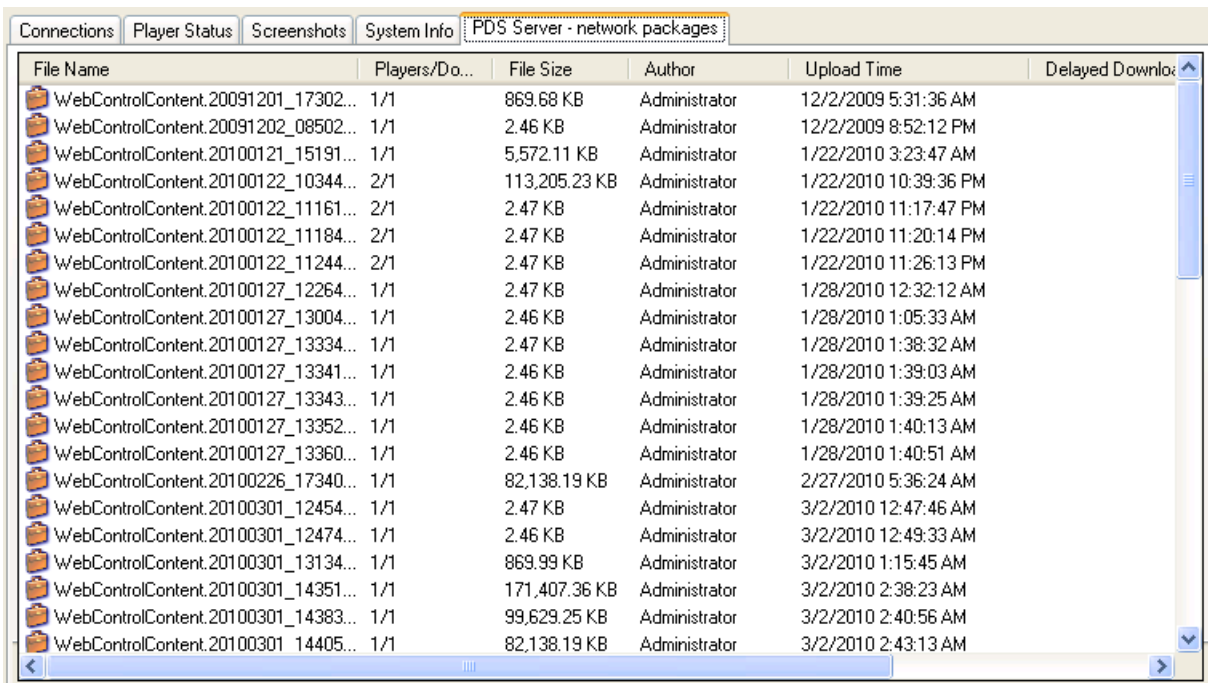


**NOTE:** The Windows version number is shown as reported by Windows, and the format of this version number does not correspond exactly to the marketing names for Window versions. For example, Windows Vista is reported in the table as "Microsoft Windows NT 6.0.6001 Service Pack 1."

- Players that are currently offline will be shown as dimmed, i.e., the text of their table row will be a light gray color, and you will not be able to perform most operations on them.
- You can sort the table entries by clicking any of the column headings. The PDS Remote Manager will initially sort the table by Player name.

## Network Packages

Network packages can be observed from the Network Packages tab. To send network packages, open the Web Controller or use the Publish Content tool in the Remote Manager.



File Name	Players/Do...	File Size	Author	Upload Time	Delayed Download
WebControlContent.20091201_17302...	1/1	869.68 KB	Administrator	12/2/2009 5:31:36 AM	
WebControlContent.20091202_08502...	1/1	2.46 KB	Administrator	12/2/2009 8:52:12 PM	
WebControlContent.20100121_15191...	1/1	5,572.11 KB	Administrator	1/22/2010 3:23:47 AM	
WebControlContent.20100122_10344...	2/1	113,205.23 KB	Administrator	1/22/2010 10:39:36 PM	
WebControlContent.20100122_11161...	2/1	2.47 KB	Administrator	1/22/2010 11:17:47 PM	
WebControlContent.20100122_11184...	2/1	2.47 KB	Administrator	1/22/2010 11:20:14 PM	
WebControlContent.20100122_11244...	2/1	2.47 KB	Administrator	1/22/2010 11:26:13 PM	
WebControlContent.20100127_12264...	1/1	2.47 KB	Administrator	1/28/2010 12:32:12 AM	
WebControlContent.20100127_13004...	1/1	2.46 KB	Administrator	1/28/2010 1:05:33 AM	
WebControlContent.20100127_13334...	1/1	2.47 KB	Administrator	1/28/2010 1:38:32 AM	
WebControlContent.20100127_13341...	1/1	2.46 KB	Administrator	1/28/2010 1:39:03 AM	
WebControlContent.20100127_13343...	1/1	2.46 KB	Administrator	1/28/2010 1:39:25 AM	
WebControlContent.20100127_13352...	1/1	2.46 KB	Administrator	1/28/2010 1:40:13 AM	
WebControlContent.20100127_13360...	1/1	2.46 KB	Administrator	1/28/2010 1:40:51 AM	
WebControlContent.20100226_17340...	1/1	82,138.19 KB	Administrator	2/27/2010 5:36:24 AM	
WebControlContent.20100301_12454...	1/1	2.47 KB	Administrator	3/2/2010 12:47:46 AM	
WebControlContent.20100301_12474...	1/1	2.46 KB	Administrator	3/2/2010 12:49:33 AM	
WebControlContent.20100301_13134...	1/1	869.99 KB	Administrator	3/2/2010 1:15:45 AM	
WebControlContent.20100301_14351...	1/1	171,407.36 KB	Administrator	3/2/2010 2:38:23 AM	
WebControlContent.20100301_14383...	1/1	99,629.25 KB	Administrator	3/2/2010 2:40:56 AM	
WebControlContent.20100301_14405...	1/1	82,138.19 KB	Administrator	3/2/2010 2:43:13 AM	

## Remote Player Management Console

Double-clicking a Player in the Network pane (double-clicking the Player row in a tabular view, or double-clicking the Player's thumbnail image in an image view) will bring up the PDS Remote Player Management Console window. This window presents more detailed status information on the Player and provides tools for managing and controlling the Player.

Parameter	Value
<b>General</b>	
Player Name	SPENCERPDS
Self-Healing On	No
In Operation (sched...	Yes
Status	On-Air: Good
Status changed	3/2/2010 6:12:22 PM
Last action	
<b>Performance</b>	
CPU Load	18%
Wave Audio	0 VU
Memory (Page File)	1572 MB (36%)
Disk space used	53 GB (176 GB free)
<b>Now Playing</b>	
Slot	3
Playlist	C:\X\presenterContent\Playlists\Xe_MasterPlaylist.xplst
<b>Status</b>	
Master Volume	0
Status Local Time	3/3/2010 2:05:26 PM
Screenshot Local Ti...	3/3/2010 2:05:22 PM
Last Heartbeat (Loc...	3/3/2010 2:05:25 PM

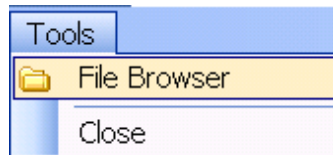
The Remote Player Management Console window consists of four parts:

- the menu bar and tool bar, which include the "Tools" menu and the buttons used for Player operations;
- the performance meter pane, which includes LED-style graphs to show the current levels for page file size, CPU usage, audio level, and disk usage;
- the screenshots pane, which includes a tab and display area to show the screenshots for each of the system's display outputs; and
- the status detail pane, with tabs to show different detail elements of the systems status (this pane is discussed in more detail below).



## Tools Menu

The Tools menu contains the following options:

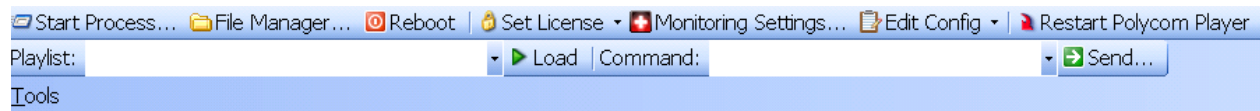


- **File Browser:** Select this option to bring up a File Manager view, browsing the Player's file system, in a separate window. The File Manager is described in detail below.
- **Close:** Select this option to close the Remote Player Management Console window.

Note that you can work in the main Polycom Digital Signage Remote Manager Window and in the Remote Player Management Console at the same time, and you may also have multiple Management Console windows open at once. However, keep in mind that each open Management Console window receives a refreshed set of screenshots every five seconds, so each open window will consume additional network bandwidth.

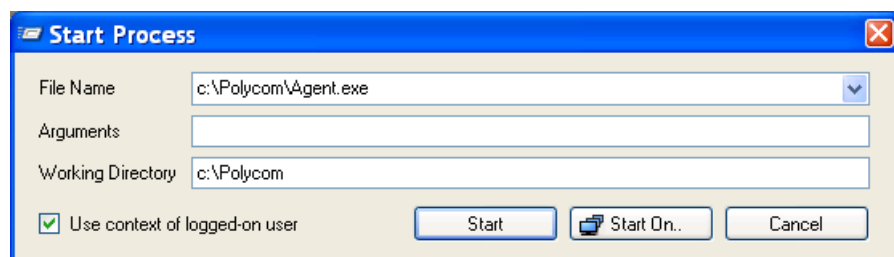
## Tool Bar

The tool bar contains a number of buttons for performing management tasks on the Player:



### Start Process

The "Start Process" button allows you to start a new process on the Player. Click the button to bring up the Start Process dialog:



- In the **File Name** field, enter the full path (on the Player) of the program to run.

- In the **Arguments** field, enter the command-line parameters, if any.
- In the **Working Directory** field, enter the full path of the directory (on the Player) that will be the working directory for the new process.
- To cancel and return to the Remote Player Management Console, click **Cancel**.
- To schedule the process on multiple Players, click **Start On...** You will be brought to a new dialog with a tree view of the Player network. Select a Player to run this process by checking the check box next to that Player's name.
- To start the process on the current Player only, click **Start**.

## File Manager

Click **File Manager...** to bring up a File Manager view, browsing the Player's file system, in a separate window.

The File Manager is described in detail in the section below.

## Reboot

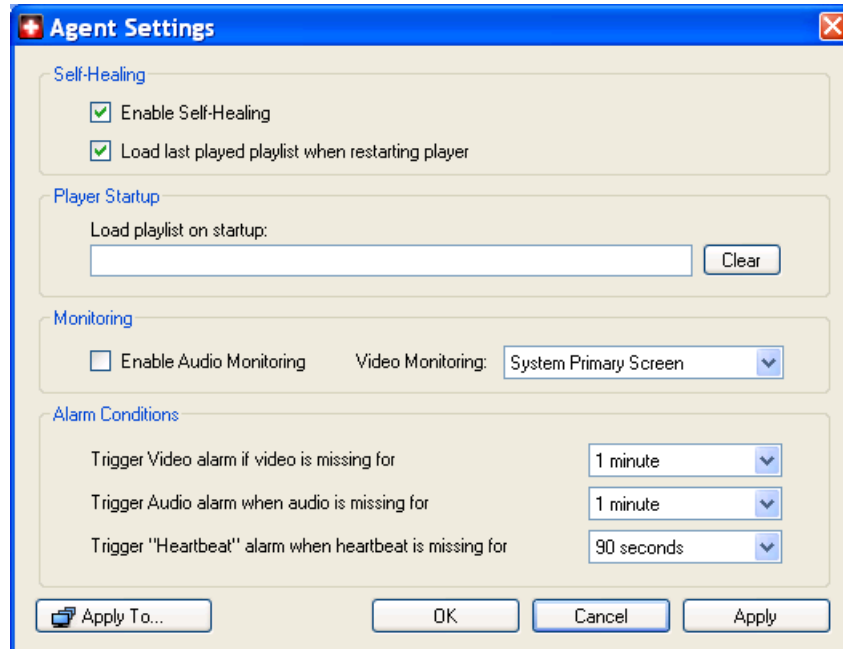
Click **Reboot** to reboot the Player immediately. (Note that this will reboot the entire system. This is the same as selecting **Shut Down... > Restart** from the Start menu in Windows.)

## Set License

Click **Set License** to bring up a menu listing the components on the Player that can be licensed. Once you select a component, Remote Manager will display a dialog box with that component's product ID and a field for you to enter the component's license key.

## Monitoring Settings

The Monitoring Settings dialog box allows you to configure different settings for the Player Agent:



- **Enable Self-Healing** allows the agent to take corrective action should a Player experience a problem playing out content.
- **Load last played playlist...** to have the PDS Player automatically load the previously running playlist any time it is started.
- In **Player Startup**, you can optionally enter the name of a playlist to be loaded by the Player when it starts up.
- Check **Enable Audio Monitoring** to allow the audio output and levels to be sent to the Server by the Player. If this is not checked, no audio information or levels will be checked or sent, and no audio alarms will be triggered, even if the Player is playing out audio.
- Use the **Video Monitoring** selection to choose the display output that should be monitored by the Agent-this should be the display receiving the output from the Player (usually the System Secondary Screen).
- The settings under **Alarm Conditions** allow you to control how quickly the Player Agent will send a notification to the Server when encountering the following potential problems:
  - **Missing video:** This alarm condition occurs when the agent is not able to get any video output from the Player to provide a screenshot. This usually indicates a problem with the Player.

- **Missing audio:** This alarm condition occurs when the agent is not able to obtain any audio output from the Player. This usually indicates a problem with the Player. (Note that **Enable Audio Monitoring** must be checked for this condition to trigger an alarm.)
  - **Missing heartbeat:** The Player regularly updates a timestamp file (the "heartbeat") that is checked by the Agent. This alarm condition occurs when the heartbeat has not been updated by the Player in the specified interval. This usually indicates a problem with the Player; however, for very graphics-intensive templates or on lower-end Player systems, you may need to lengthen this interval to eliminate false alarms caused by the Player simply being overloaded.
- Click **OK** to apply your changes and close the dialog box.
  - Click **Cancel** to discard your changes.
  - Click **Apply** to apply your changes but leave the dialog box open.
  - Click **Apply To...** to apply your changes to multiple Player systems. Clicking **Apply To...** will bring up a new dialog with a tree view of the Player network. Select Players to receive these changes by checking the check box next to each Player's name.

## Edit Config

This is used for advanced trouble-shooting. Please do not modify these settings without direction from Polycom Support.

## Restart Polycom Player

Click this if you wish to restart Player(s) in your network. If the Player does not have **Load previous playlist** selected, you will have to manually load a playlist using the Playlist Load functionality found in the toolbar. Alternately you could publish a playlist to the Player(s) using the Publish Content functionality, found in the main application window.

## Playlist

This feature scans available playlists on the Player hard disk and conveniently lets you select one to load.

## Command

Choose one of the commands that appears in the drop-down list to perform common tasks, such as clearing the screens. Please see [Appendix A: Player Commands](#) on page 167 for a list of commands.

## Status Detail Panel

The Status Detail panel of the Remote Player Management Console provides granular and up-to-the-moment status information regarding the Player. The Status Detail panel also provides remote process management for the Player appliance.

The Status Detail panel consists of four tabs: **Player Status**, **Running Processes**, **Windows Services**, and **File Manager**.

### Player Status

Parameter	Value
<b>General</b>	
Player Name	PDSPLAYER3
Self-Healing On	No
In Operation (sched...	Yes
Status	On-Air: Good
Status changed	3/10/2010 1:21:50 PM
Last action	
<b>Performance</b>	
CPU Load	9%
Wave Audio	0 VU
Memory (Page File)	1512 MB (35%)
Disk space used	60 GB (170 GB free)
<b>Now Playing</b>	
Slot	18
Playlist	C:\Content\Playlists\MasterPlaylist.xplst
<b>Status</b>	
Master Volume	0
Status Local Time	3/10/2010 2:50:12 PM
Screenshot Local Ti...	3/10/2010 2:50:11 PM
Last Heartbeat (Loc...	3/10/2010 2:50:12 PM

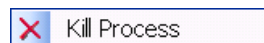
The Player Status panel provides a summary of the individual Players' performance and present status.

## Running Processes

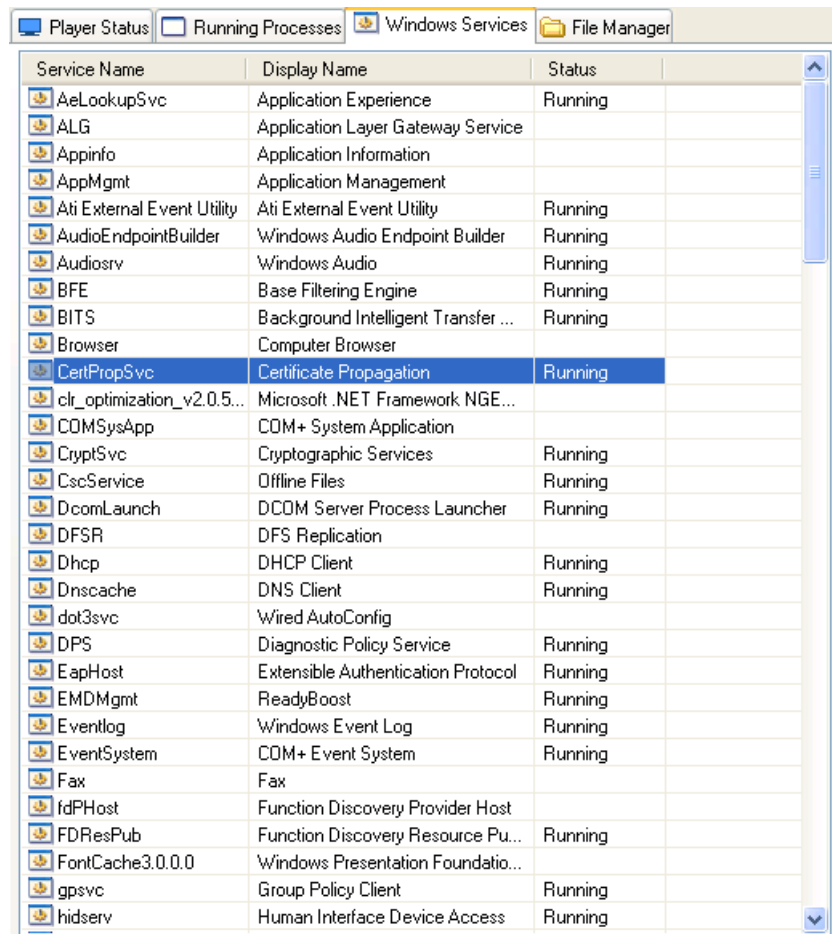
Process Name	Physical Me...	Virtual Mem...	Process ID	Win...	File Name
<input type="checkbox"/> Ati2evxx	5,228 K	53,384 K	1540		C:\Window:
<input type="checkbox"/> Ati2evxx	3,504 K	38,488 K	1012		C:\Window:
<input type="checkbox"/> audiodg	9,500 K	44,316 K	1192		
<input type="checkbox"/> BcmDeviceAndTaskS...	19,884 K	180,608 K	3884		C:\Program
<input type="checkbox"/> CCC	3,904 K	237,544 K	3688		C:\Program
<input type="checkbox"/> csrss	7,380 K	150,604 K	576		C:\Window:
<input type="checkbox"/> csrss	4,272 K	150,336 K	504		C:\Window:
<input type="checkbox"/> DCPSysMgr	6,672 K	77,704 K	4044		C:\Program
<input type="checkbox"/> Dell.ControlPoint	28,040 K	184,008 K	3924		C:\Program
<input type="checkbox"/> Dell.UCM	36,728 K	206,580 K	3520		C:\Program
<input type="checkbox"/> dwm	45,324 K	115,820 K	3576		C:\Window:
<input checked="" type="checkbox"/> explorer	35,656 K	185,772 K	1796		C:\Window:
<input type="checkbox"/> IAAnotif	4,800 K	65,124 K	3800		C:\Program
<input type="checkbox"/> IAANTmon	4,636 K	53,052 K	380		C:\Program
<input type="checkbox"/> Idle	24 K	0 K	0		
<input type="checkbox"/> jucheck	7,640 K	82,060 K	5640		C:\Program
<input type="checkbox"/> jusched	4,744 K	65,724 K	3332		C:\Program
<input type="checkbox"/> lms	3,120 K	43,652 K	1428		C:\Program
<input type="checkbox"/> lsass	1,708 K	68,120 K	660		C:\Window:
<input type="checkbox"/> lsm	4,336 K	34,552 K	676		C:\Window:
<input type="checkbox"/> MDM	5,080 K	184,488 K	2876		C:\Program
<input type="checkbox"/> MSASCui	5,436 K	73,516 K	3600		C:\Program
<input type="checkbox"/> PrivacyIconClient	21,460 K	157,980 K	1064		C:\Program
<input type="checkbox"/> SeaPort	7,052 K	70,496 K	2076		C:\Program
<input checked="" type="checkbox"/> SearchFilterHost	5,460 K	52,184 K	4828		C:\Window:
<input type="checkbox"/> SearchIndexer	16,536 K	160,300 K	2428		C:\Window:
<input type="checkbox"/> SearchProtocolHost	8,944 K	74,092 K	4732		C:\Window:
<input type="checkbox"/> SecureUpgrade	8,800 K	129,188 K	3968		C:\Program
<input type="checkbox"/> services	5,904 K	38,424 K	648		C:\Window:
<input type="checkbox"/> SLsvc	3,828 K	50,004 K	1260		C:\Window:

The Running Processes tab functions as a process manager for the remote Player.

- To stop a process running on the PDS Player, right-click on the process and click **Kill Process**.



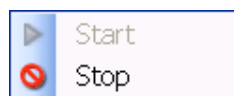
## Windows Services



Service Name	Display Name	Status
AeLookupSvc	Application Experience	Running
ALG	Application Layer Gateway Service	
Appinfo	Application Information	
AppMgmt	Application Management	
Ati External Event Utility	Ati External Event Utility	Running
AudioEndpointBuilder	Windows Audio Endpoint Builder	Running
Audiosrv	Windows Audio	Running
BFE	Base Filtering Engine	Running
BITS	Background Intelligent Transfer ...	Running
Browser	Computer Browser	
CertPropSvc	Certificate Propagation	Running
clr_optimization_v2.0.5...	Microsoft .NET Framework NGE...	
COMSysApp	COM+ System Application	
CryptSvc	Cryptographic Services	Running
CscService	Offline Files	Running
DcomLaunch	DCOM Server Process Launcher	Running
DFSR	DFS Replication	
Dhcp	DHCP Client	Running
Dnscache	DNS Client	Running
dot3svc	Wired AutoConfig	
DPS	Diagnostic Policy Service	Running
EapHost	Extensible Authentication Protocol	Running
EMDMgmt	ReadyBoost	Running
Eventlog	Windows Event Log	Running
EventSystem	COM+ Event System	Running
Fax	Fax	
fdPHost	Function Discovery Provider Host	
FDResPub	Function Discovery Resource Pu...	Running
FontCache3.0.0.0	Windows Presentation Foundatio...	
gpsvc	Group Policy Client	Running
hidserv	Human Interface Device Access	Running

The Windows Services tab displays the Windows services on the selected PDS Player. As with the Running Processes tab, users can remotely start and stop these services when necessary.

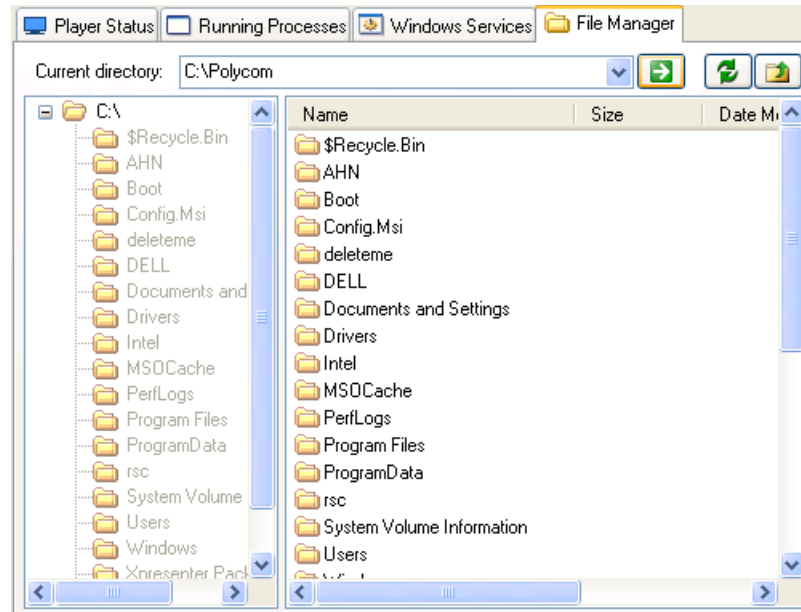
- To stop a running Windows service, right-click on the service and click **Stop**.



- To start a Windows service, right-click on the service and click **Start**.

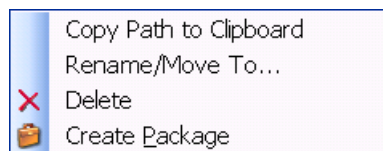


## File Manager



The File Manager allows direct management of the files on the PDS Player. Using the File Manager, administrators can navigate through the files stored on the PDS Player.

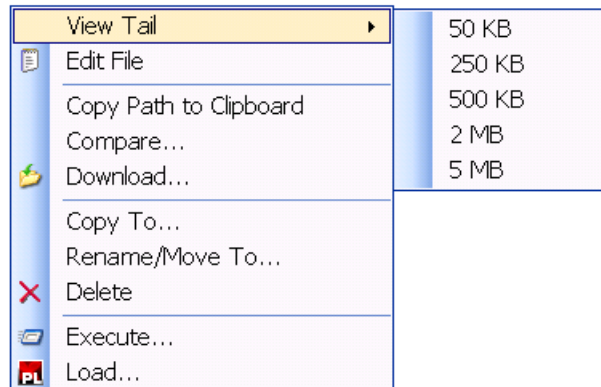
- If you wish to alter or edit a folder, right-click on the folder. A pop-up appears:



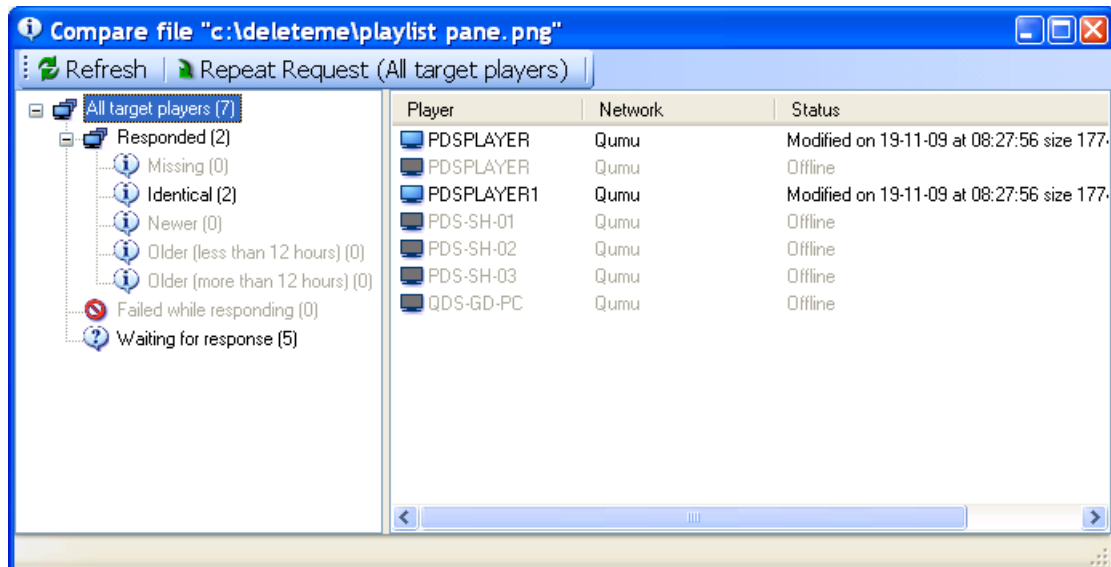
- **Copy Path to Clipboard:** Copies the path of the folder as text.
- **Rename/Move To:** Allows users to rename or move the folder.
- **Delete:** Deletes the file.
- **Create Package:** Saves the folder as a PDS Package for distribution.



- Right-clicking on a file will launch the following pop-up:

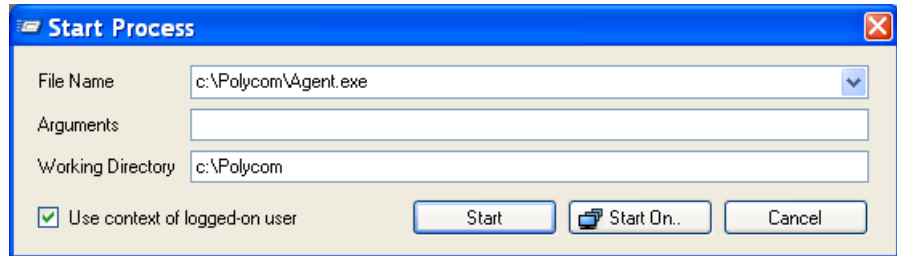


- **View Tail:** Launches a text editor which displays the last 50 KB to 5 MB of data contained in a file.
- **Edit File:** Launches a text editor with which users can edit files.
- **Copy Path to Clipboard:** Copies the path of the folder as text.
- **Compare...:** Allows users to compare files across multiple Players. This tool is useful for ensuring that packages have published correctly. After running the comparison, the following window appears:



- **Download...:** Allows users to download files from a Player to the computer running Remote Manager.
- **Copy To...:** Allows users to copy the file to another location on the PDS Player.
- **Rename/Move To:** Allows users to rename or move the file.
- **Delete:** Deletes the file.

- **Execute...:** Executes a specific file. Please note that this function allows users to browse for files to run, rather than using the Start Process item in the Remote Player Management Console Tool Bar.



- **Load...:** Directly loads PDS Playlists and Templates in the PDS Player.

---

# Using the Web Controller

This chapter outlines the use of the Polycom Web Controller in content management procedures. It contains the following sections:

- [About the PDS Web Controller](#)
- [Installing the Web Controller](#)
- [Opening the Web Controller](#)
- [Web Controller Interface Guide](#)
- [Control Panel](#)
- [Playlist Editor](#)
- [Crawling Ticker](#)
- [Slide Show Tickers](#)
- [Video Slide Content](#)
- [Message Board/Webcast](#)
- [Alerts](#)
- [Settings](#)

## About the PDS Web Controller

The Polycom PDS Web Controller gives administrators remote control over the content and settings of individual Polycom PDS Players. In addition to its powerful central content management interface, the Polycom PDS Web Controller provides professionally-designed and fully customizable templates, automated news and data feeds, and direct Player oversight.

## Installing the Web Controller

Web Controller is supported on Windows XP, Windows Vista (32 bit), and Windows 7 (32 bit). Windows Vista and Windows 7 require the additional pre-installation steps outlined below.

### Pre-Installation Procedures on Windows Vista and Windows 7

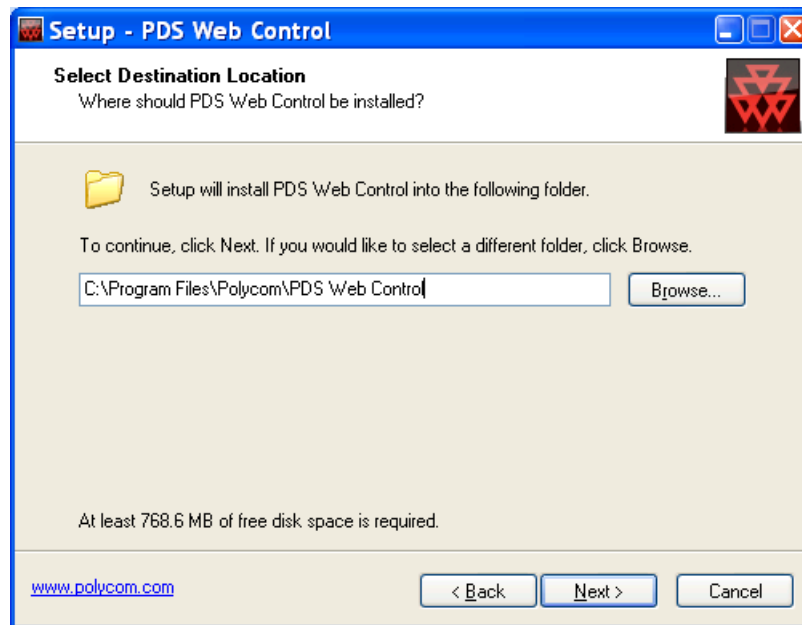
- 1 Open the **Start** menu. Type **MSconfig** in the Search field and click enter. The System Configuration window will open.
- 2 Go to the **Tools** tab.
- 3 Select the option **Disable UAC** under the "Tool Name" column.
- 4 Click **Launch**.
- 5 Restart the computer.
- 6 Perform the installation steps detailed below.

### Installation

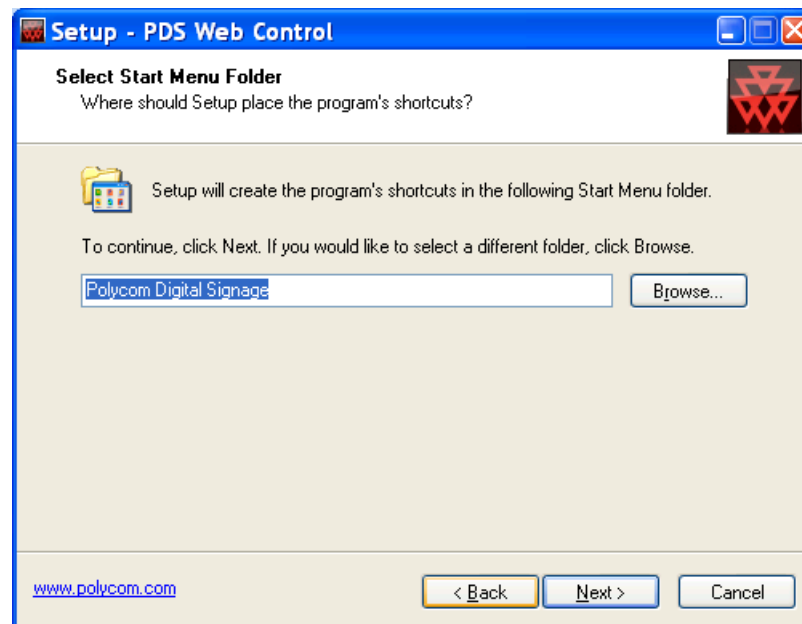
- 1 Find the Polycom Digital Signage Web Controller installer in the C:\software directory on the Polycom Digital Signage Server.
- 2 Distribute this file to your computer.
- 3 Double click on the PDS Web Controller setup .exe file. The PDS Web Controller setup screen appears. Click **Next**.



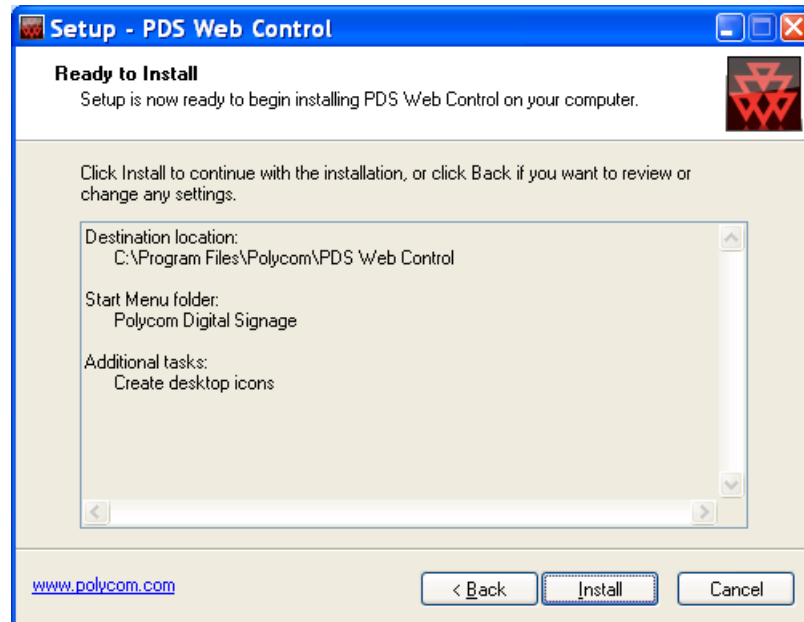
- 4 Designate a destination for the file. The default directory, C:\Program Files\Polycom\PDS Web Controller, is recommended. Click **Next**.



- 5 Choose a folder to appear in the Start Menu. Click **Next**.



- 6 A review screen will appear. Click **Install**.

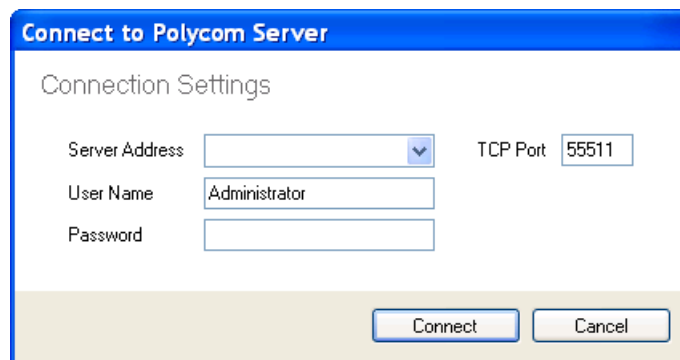


- 7 Double click on the PDS Web Controller desktop icon to begin.



## Opening the Web Controller

When you first open the Polycom Digital Signage Web Controller application, you will be prompted to enter your login credentials:



The default server name is PDSSERVER. The default credentials for Content Managers are ContentAdmin/Polycom123.

Please note that you should not need to edit the TCP Port when using the default PDS Server configuration.

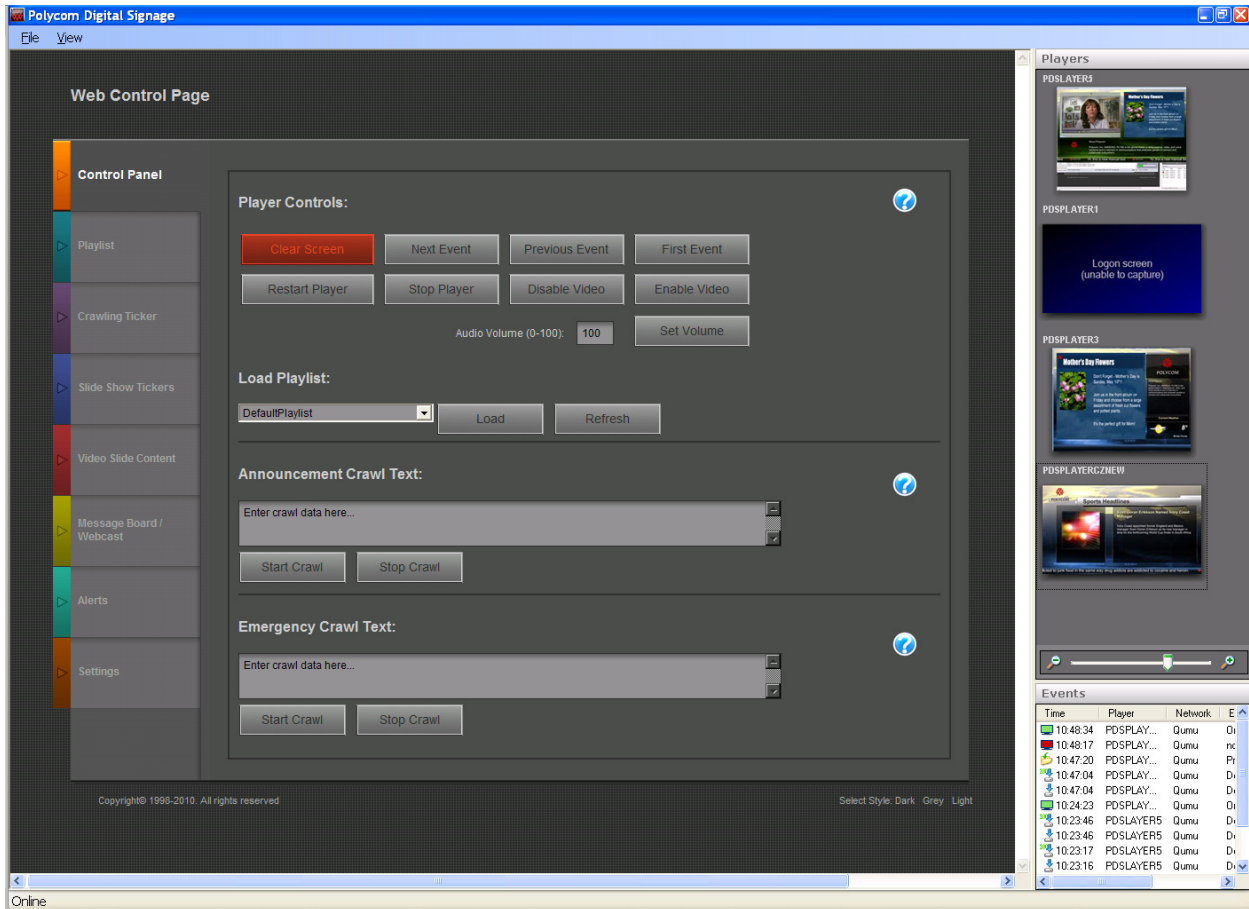
## Licensing the Web Controller

The Web Controller must be licensed prior to use. To license the Web Controller:

- 1** Navigate to **File > License**.
- 2** The License dialog will appear.
  - a** In the dialog, click the **Request a License Key** button.
  - b** Enter the **PDS Serial Number**. The PDS Serial Number, provided by your sales representative in your fulfillment email, is unique per customer and comprehensive across the Polycom Digital Signage solution. Do not discard this number.
- 3** Click **Request License Key** to request the license key, which will automatically populate the license key field in the initial dialog.
- 4** Click **OK**.

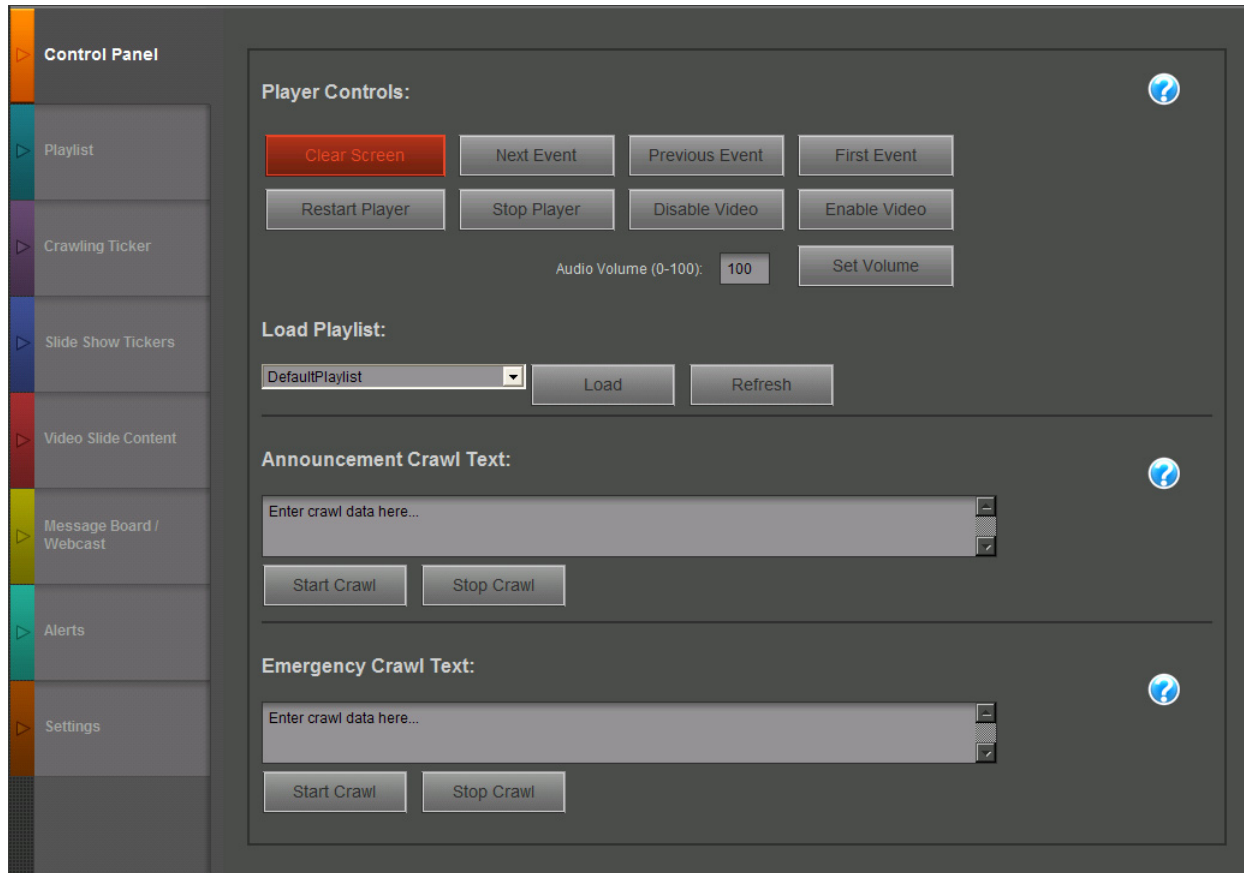
# Web Controller Interface Guide

After login and licensing, the Web Controller landing page appears.





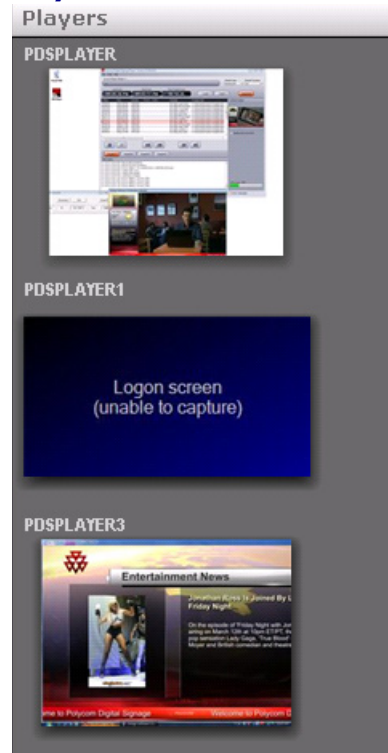
## Main Panel



All content management and Player configuration tools reside in the Main Panel of the Web Control.

Each tab is documented individually throughout the rest of the chapter.

## Player Monitor Panel



The Player Monitor Panel of the Web Controller user interface displays screenshots of all connected Players on the given network of the Polycom Digital Signage Server. Use the Zoom tool to change the level of resolution of the display.



### To change monitor settings:

- 1 Right-click on the chosen PDS Player. Click **Full Screen Monitor...**

- 2 The Full Screen Monitor pop-up will appear.



- 3 To change the Monitor view, open the **Screen** drop-down on the far left. Choose whether to view the PDS Output Screen, System Primary Screen, or System Secondary Screen.
- For more information about using multiple screens with the PDS Player, please consult [Configuring PDS Player Video Settings](#) on page 6.
- 4 To change the monitor's update frequency, open the **Update Interval** drop-down and select a new timeframe.

## Events Panel

The Events Panel provides feedback for PDS Web Controller users during the publication process. The events detailed include content updates, errors, and Player status changes. Changes made in the Web Controller may not take effect until the package has completed the download and processing of a package; this panel allows you to monitor the states of these processes.

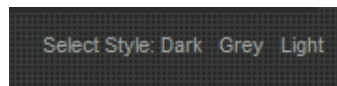
Events			
Time	Player	Event	
10:16:12	PDSPLAY...	Processed ContentUpdate.201...	
10:16:08	PDSPLAY...	Downloaded ContentUpdate.2...	
10:16:08	PDSPLAY...	Downloading ContentUpdate.2...	

## Changing the Layout

To change the layout of the above panels, navigate to **View** and choose **Horizontal Layout** or **Vertical Layout**. The Vertical Layout, selected by default, places the Monitor Panel to the right of the Main Panel; the Horizontal Layout places it below the Main Panel.

A user can also freely change the look and feel by dragging and resizing the panes within the Web Controller.

## Style



The style selection menu allows users to choose a different visual style for the Web Controller.

## Control Panel

The Control Panel provides a set of direct controls over the Players in the associated network. The Control Panel is the starting point for content management on Players. Greater detail is provided on the subsequent tabs in the PDS Web Controller, but the Control Panel gives immediate access to overarching controls.

The screenshot displays the Control Panel interface. On the left is a vertical navigation menu with the following items: Control Panel (selected), Playlist, Crawling Ticker, Slide Show Tickers, Video Slide Content, Message Board / Webcast, Alerts, and Settings. The main content area is titled 'Control Panel' and contains several sections:

- Player Controls:** Includes buttons for 'Clear Screen' (highlighted in red), 'Next Event', 'Previous Event', 'First Event', 'Restart Player', 'Stop Player', 'Disable Video', and 'Enable Video'. Below these is an 'Audio Volume (0-100):' slider set to 100 and a 'Set Volume' button.
- Load Playlist:** Features a dropdown menu showing 'Xe\_MasterPlaylist', a 'Load' button, and a 'Refresh' button.
- Announcement Crawl Text:** Contains a text input field with the placeholder 'Enter crawl data here...', a 'Start Crawl' button, and a 'Stop Crawl' button.
- Emergency Crawl Text:** Contains a text input field with the placeholder 'Enter crawl data here...', a 'Start Crawl' button, and a 'Stop Crawl' button.

### Player Controls

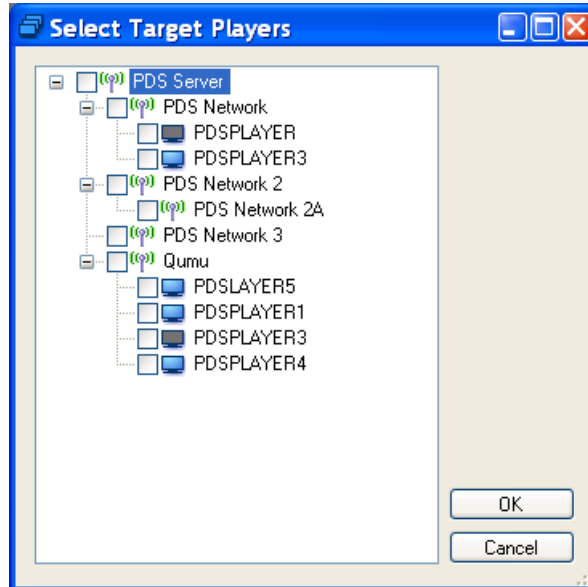
This close-up screenshot shows the 'Player Controls' section of the interface. It features a grid of buttons: 'Clear Screen' (red), 'Next Event', 'Previous Event', 'First Event', 'Restart Player', 'Stop Player', 'Disable Video', and 'Enable Video'. Below the buttons is an 'Audio Volume (0-100):' slider set to 100 and a 'Set Volume' button. At the bottom, the 'Load Playlist:' section includes a dropdown menu set to 'DefaultPlaylist', a 'Load' button, and a 'Refresh' button.

The **Player Controls** section allows immediate changes to be made to the Player. Unlike text edits or playlist changes elsewhere in the Web Controller, one click on each of these options will update Players targeted in the selection wizard:

- **Clear Screen:** resets the Player and clears the Player screen.
- **Next Event:** Advances to the next event in the playlist.
- **Previous Event:** Returns to the previous event in the playlist.
- **First Event:** Returns to the first event in the playlist.
- **Restart:** Shuts down the Player and restarts it. This tool can be used to perform a full reset of the application.
- **Stop:** Shuts down the Player.
- **Disable Video:** Shuts down video card output, bringing the Player into standby mode. Please note that the Player will cease output when this is chosen.
- **Enable Video:** Resumes video card output on the Player.
- **Volume:**
  - Change the Audio Volume. 100 is the default; 0 will mute the output.
  - Click **Set Volume**.
- **Load Playlist:** This option loads the playlist selected from the dropdown menu. Click **Refresh** to restart the playlist.

## Selection Wizard

After selecting one of the above options, the Player selection window will appear.



Offline Players will display a darkened screen; online Players will show a blue screen.

Click OK.



**Note:** In order for the changes made in the PDS Web Controller to take effect, all affected Players must be online and running the PDS Player application. Updates made offline will not take effect automatically.

## Editing the Announcement and Emergency Crawls

**Announcement Crawl Text:**

Enter crawl data here...

Start Crawl
Stop Crawl

---

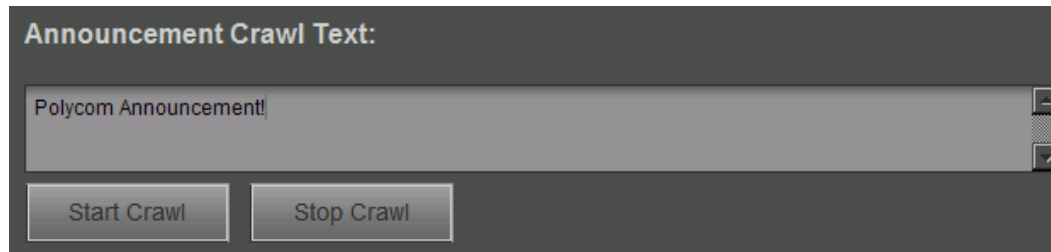
**Emergency Crawl Text:**

Enter crawl data here...

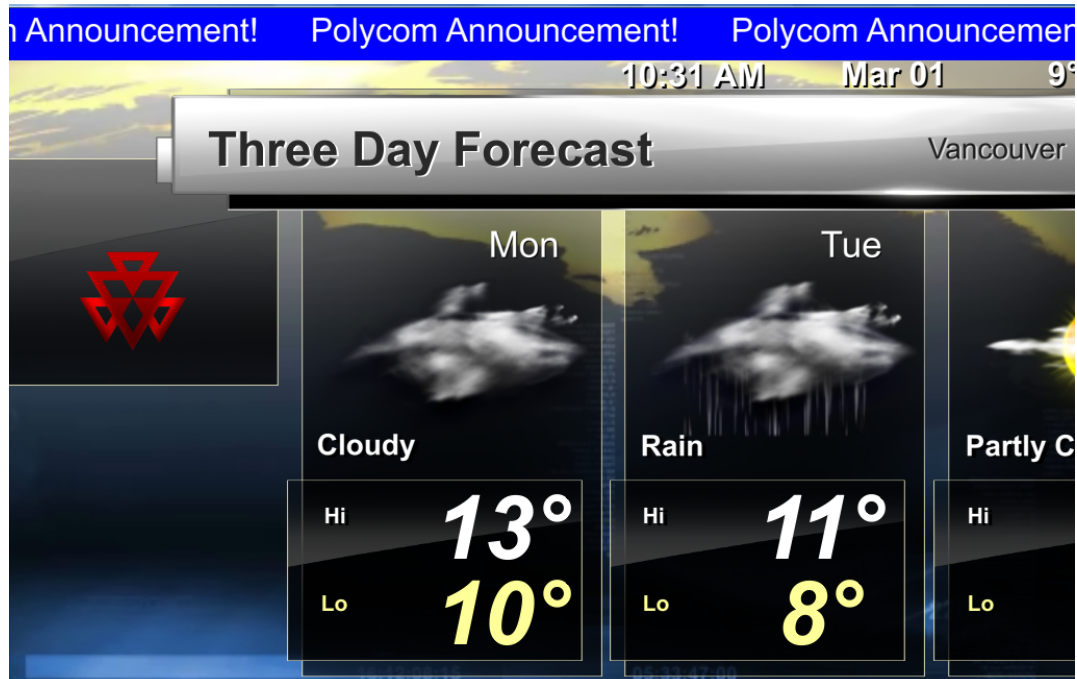
Start Crawl
Stop Crawl

The Announcement and Emergency Crawls can be edited, started, and stopped from the Control Panel. These crawls will not change or stop the playlist in progress but will instead run at the top of the screen. To publish a crawl to a PDS Player:

- 1 To change an announcement, edit the crawl text field.



- 2 Click **Start Crawl**. The Player selection window will appear. Choose the target Player or Players for your announcement. Click **OK**.
- 3 The Announcement Crawl should appear on the Player shortly.





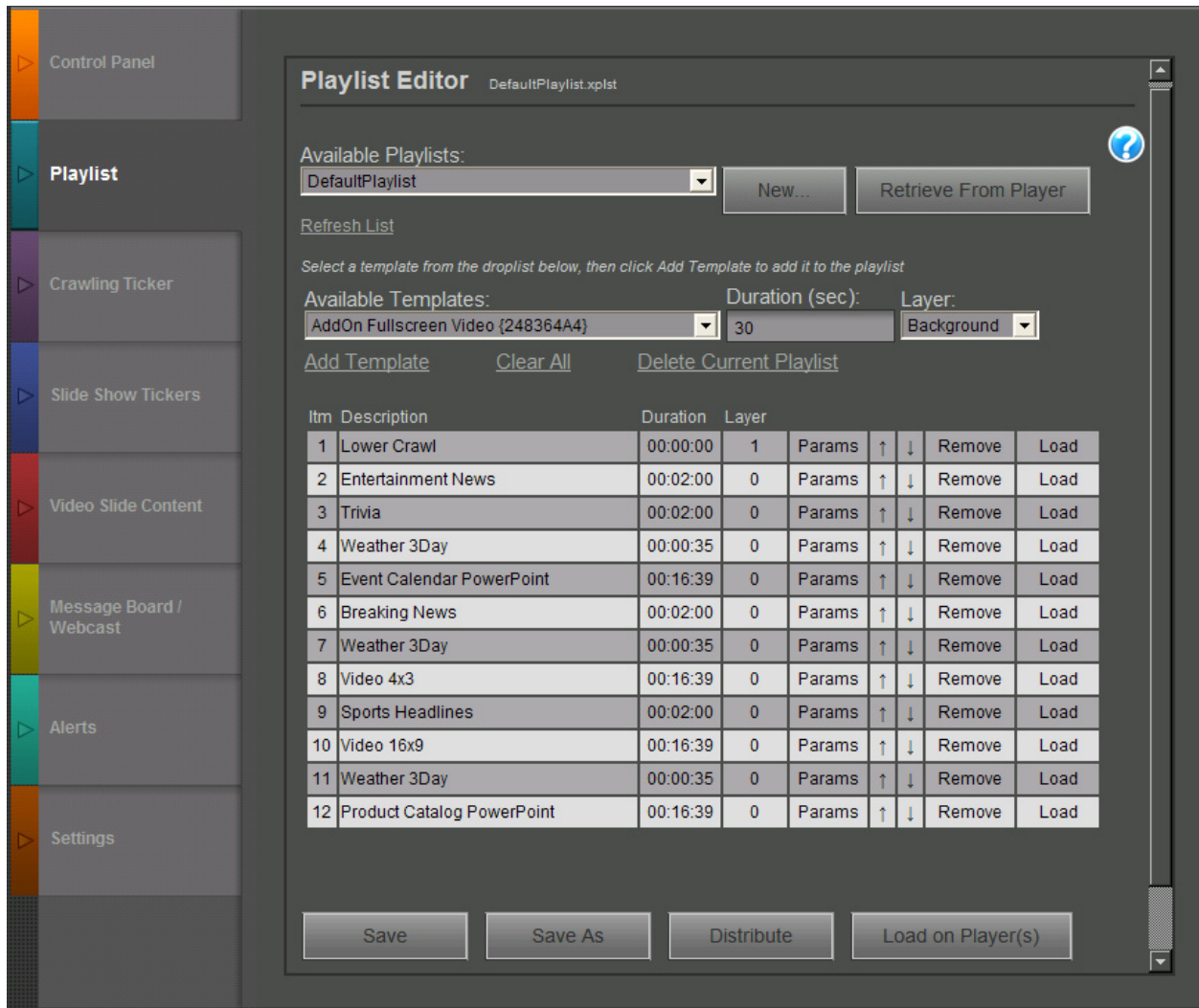
Please note that the Emergency Crawl will appear in red:



- 4 To stop the crawl, click **Stop Crawl** in the Web Controller. The Player Selection screen will appear again; indicate which Player you wish to target and click **OK**.

# Playlist Editor

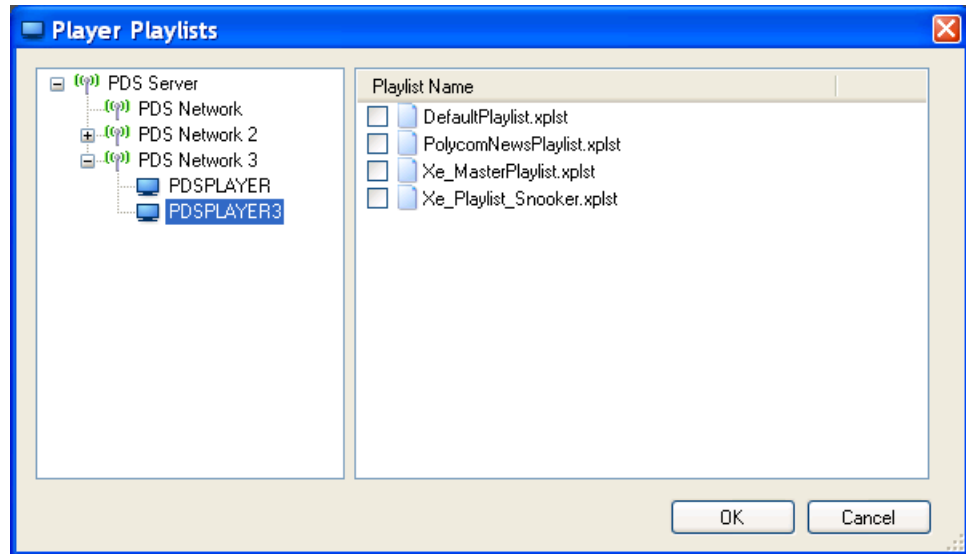
The Playlist Editor tab in the Web Controller provides controls over playlists displayed in the PDS Player.



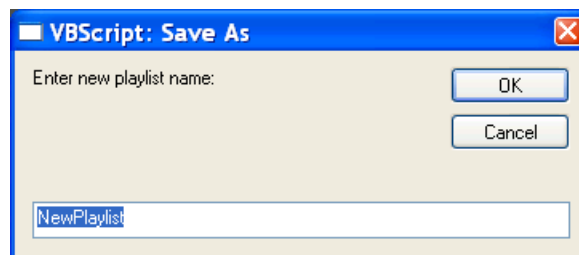
**To create, edit, or play Playlists via the Playlist Editor:**

- 1 Select a Playlist from the **Available Playlists** drop-down range.

- a To retrieve a specific Playlist from a player for editing, click **Retrieve from Player**. The Player Selection window will appear; choose a player and a playlist and click **OK**.



- b To create a new playlist, click **New**. The **Save As** dialog appears. Enter a name and click **OK**.



Alternatively, click **Save As** at the bottom of the Editor.

## 2 The Playlist will then appear.

Available Playlists:  
 PolycomNewsPlaylist

[Refresh List](#)

Select a template from the droplist below, then click Add Template to add it to the playlist

Available Templates:  Duration (sec):  Layer:

[Add Template](#) [Clear All](#) [Delete Current Playlist](#)

Item	Description	Duration	Layer					
1	Lower Crawl	00:00:00	1	Params	↑	↓	Remove	Load
2	lib Lobby FSData {F994CDB1}	00:02:00	0	Params	↑	↓	Remove	Load
3	Entertainment News	00:02:00	0	Params	↑	↓	Remove	Load
4	Trivia	00:02:00	0	Params	↑	↓	Remove	Load
5	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
6	Event Calendar PowerPoint	00:16:39	0	Params	↑	↓	Remove	Load
7	Breaking News	00:02:00	0	Params	↑	↓	Remove	Load
8	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
9	Video 4x3	00:16:39	0	Params	↑	↓	Remove	Load
10	Sports Headlines	00:02:00	0	Params	↑	↓	Remove	Load
11	Video 16x9	00:16:39	0	Params	↑	↓	Remove	Load
12	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
13	Product Catalog PowerPoint	00:16:39	0	Params	↑	↓	Remove	Load

- 3 To add a template to the playlist:
  - a Choose a template from the **Available Templates** drop-down menu.
  - b Choose the duration in seconds for which the template will run.
  - c Choose whether the item will run in the foreground (appropriate only for crawling tickers) or in the background.
  - d Click **Add Template**.
- 4 To change the configuration of an existing template, click on a **Description, Duration, Layer, or Parameter** field to launch an editor.
- 5 To move a template within a playlist, use the up and down arrows within the editor. The order of the template will determine when the template plays on the playlist.
- 6 To load a specific template within a playlist, click the **Load** link.

- 7 To remove a single template, click the **Remove** link beside the template inside the Playlist. To remove all templates from the Playlist, click **Clear All**. To delete the Playlist altogether, click **Delete Current Playlist**.
- 8 When all configuration changes have been made, click **Save** to save the Playlist within the Web Controller.
- 9 Click **Distribute** to send the Playlist to the selected target Players.
- 10 Click **Load on Player(s)** to load the Playlist on the selected target Players.

## Adding Content through the Playlist Editor

### Content Directory

Prior to making changes to PDS Player content by means of the PDS Web Controller, content managers should create a central directory for all video, text, and PowerPoint files intended for distribution to PDS Players. These directories must reside on the C: drive of the computer running the Web Controller.

For situations in which a single content manager is responsible for all content distributed on a network, Polycom recommends creating the directory **C:\Content**.

For implementations in which multiple content managers oversee the same network, we recommend creating the directory **C:\[ContentManagerName]**.

If properly configured on the computer running the Web Controller, this directory will automatically be created on the target players during the Playlist publication process.



**NOTE:** Data files that supply information for the various Trivia, News, and Weather templates must reside in the **C:\XPresenterContent\Data** directory. The processes for updating these files are outlined in subsequent sections below.

## Default Playlist

The PDS Player and PDS Web Controller ship with a preconfigured default playlist:

The screenshot shows the Playlist Editor interface. At the top, there is a section for 'Available Playlists' with a dropdown menu set to 'DefaultPlaylist', a 'New...' button, and a 'Retrieve From Player' button. Below this is a 'Refresh List' link and a note: 'Select a template from the droplist below, then click Add Template to add it to the end of the playlist'. The 'Available Templates' section includes a dropdown menu set to 'AddOn L Bar Streaming Video', a 'Duration (sec):' field set to '30', and a 'Layer:' dropdown menu set to 'Background'. Below these are buttons for 'Add Template', 'Clear All', and 'Delete Current Playlist'. The main part of the interface is a table with 12 rows, each representing an item in the playlist. The table has columns for 'itm', 'Description', 'Duration', 'Layer', 'Params', and actions (up/down arrows, 'Remove', and 'Load').

itm	Description	Duration	Layer	Params	↑	↓	Remove	Load
1	Lower Crawl	00:00:00	1	Params	↑	↓	Remove	Load
2	Entertainment News	00:02:00	0	Params	↑	↓	Remove	Load
3	Trivia	00:02:00	0	Params	↑	↓	Remove	Load
4	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
5	Event Calendar PowerPoint	00:16:39	0	Params	↑	↓	Remove	Load
6	Breaking News	00:02:00	0	Params	↑	↓	Remove	Load
7	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
8	Video 4x3	00:16:39	0	Params	↑	↓	Remove	Load
9	Sports Headlines	00:02:00	0	Params	↑	↓	Remove	Load
10	Video 16x9	00:16:39	0	Params	↑	↓	Remove	Load
11	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
12	Product Catalog PowerPoint	00:16:39	0	Params	↑	↓	Remove	Load

The following templates constitute the default playlist:

- **Lower Crawl:** the crawl that plays throughout the playlist. Can be edited in the Crawling Ticker tab in the Web Controller. To remove the crawl from the PDS Player output, delete this template from the playlist.
- **Entertainment News:** a default data feed that displays entertainment news from a pre-defined feed. This feed updates regularly and populates the template with headlines, stories (usually one or two sentences), and images if possible.
- **Trivia:** a template that displays trivia questions and answers generated by a data file.
- **Weather 3Day:** displays local weather for the next three days.
- **Event Calendar PowerPoint:** Displays a user-designated PowerPoint. This PowerPoint can be retrieved, edited, replaced, and distributed (as ppt or as a jpg archive) via the Slide Show Tickers tab in the Web Controller.
- **Video 4x3:** Displays a user-designated standard ratio video. This template is editable in the Video Slide Content tab of the Web Controller.

- **Sports Headlines:** a default data feed that displays sports news from a pre-defined feed. This feed updates regularly and populates the template with headlines, stories (usually one or two sentences), and images if possible.
- **Video 16x9:** Displays a user-designated widescreen video. This template is editable in the Video Slide Content tab of the Web Controller.
- **Product Catalog PowerPoint:** Displays a user-designated PowerPoint presentation. This PowerPoint can be retrieved, edited, replaced, and distributed (as ppt or as a jpg archive) via the Slide Show Tickers tab in the Web Controller.



**NOTE:** The Default Playlist includes preconfigured text, video, and PowerPoint presentation content. However, these elements are intended to be user-edited. For information on adding and editing content in templates, please see below.

## Templates

The PDS Web Controller includes a library of default templates that can be added to a playlist from the **Available Templates** drop-down. The information and possible parameter changes for each of these additional templates follows.

### AddOn L Bar Streaming Video

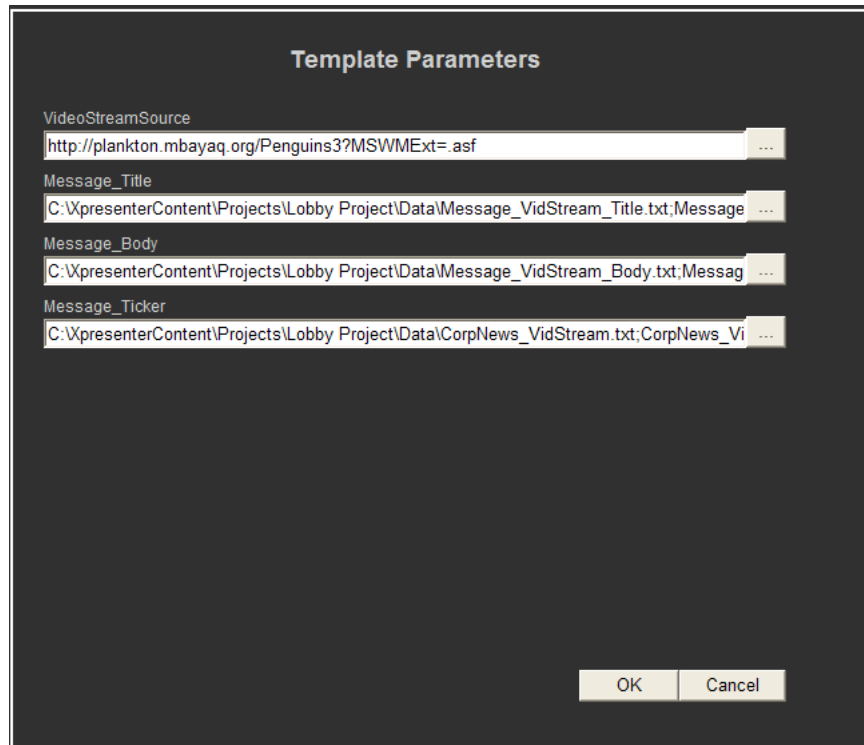
The AddOn L Bar Streaming Video template displays a streaming video or URL, a fixed message, and a text ticker.



**NOTE:** Websites are not resized automatically. Some sites may be restricted on player output given the resolution.

- 1 Click on the **Params** link beside "AddOn L Bar Streaming Video."

**2** The Template Parameters screen will appear.



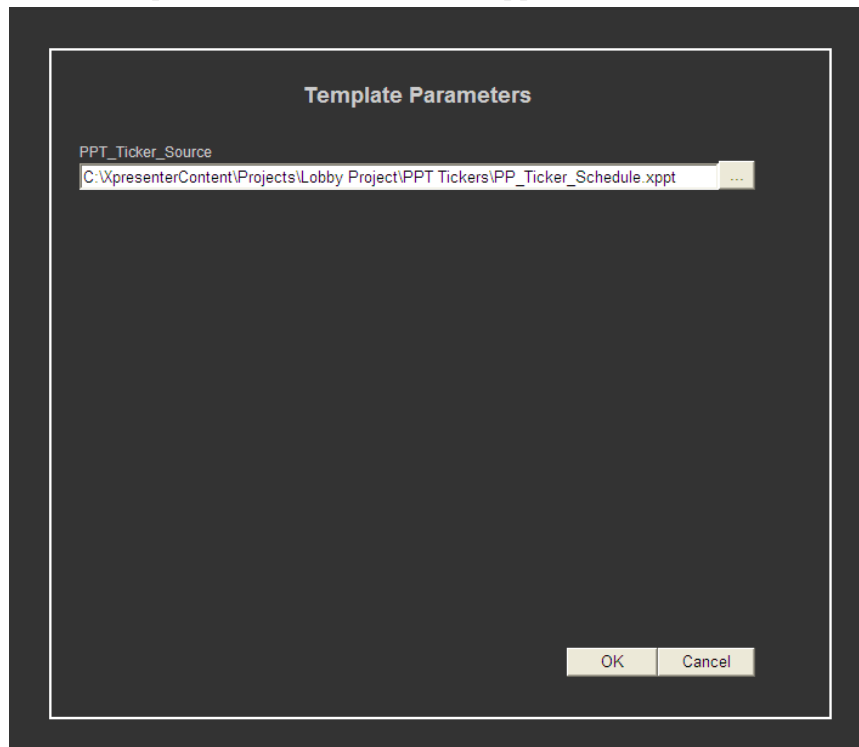
- 3** To add a live video stream or website display, enter the URL in the text field under **VideoStreamSource**.
- 4** To add a static message:
  - a** Click the browse (...) button under **Message\_Title**.
  - b** In the dialog that appears, choose the text file with the message title.
  - c** Click **Open**.
  - d** Next, click the browse (...) button under **Message\_Body**.
  - e** In the dialog that appears, choose the text file that contains the message body.
- 5** To add a message ticker:
  - a** Click the browse (...) button under **Message\_Ticker**.
  - b** Select a text file. The Message Ticker displays two lines of text at a time; ensure that your text file is edited properly.
  - c** Click **Open**.
- 6** Click **OK** when all changes have been completed.



**AddOn PowerPoint Schedule:**

Displays a PowerPoint slide of your choosing; this template is intended to display a calendar or schedule created in PowerPoint. To add your own schedule template:

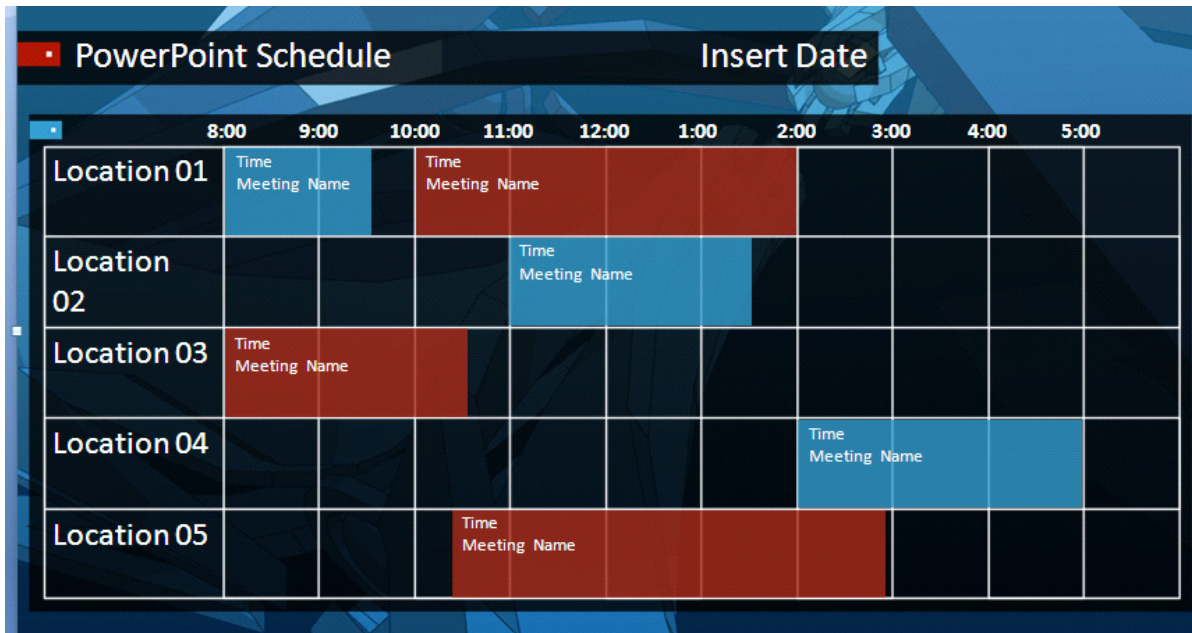
- 1 Click on the **Params** link beside "AddOn PPT Schedule."
- 2 The Template Parameters screen will appear.



- 3 Click on '...', the browse button. This will bring up your list of available PowerPoint templates for selection.

Click on the **PP\_Ticker\_Schedule.ppt** file. Right-click on this file and select **Open**.

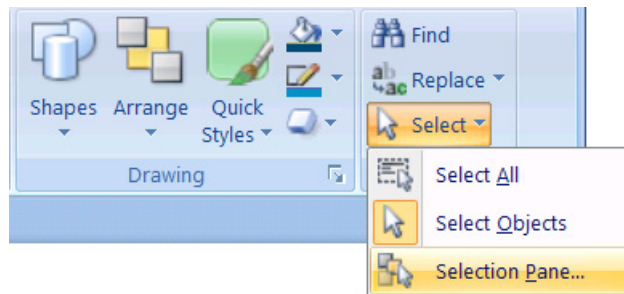
- 4 PowerPoint will launch. You will then have the below PowerPoint slide available for changes and population of your required data.



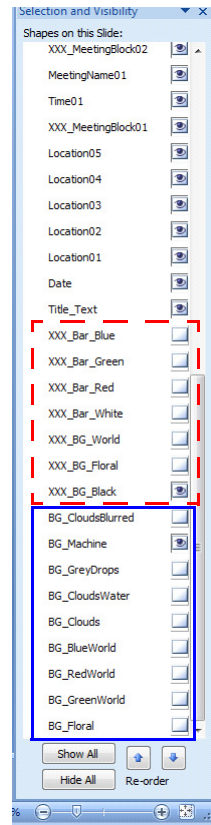
- 5 From here you can adjust the default information, including location names, time intervals, meeting names, etc., using the PowerPoint application.

To change the style of this PowerPoint schedule:

- a Click **Select** in the PowerPoint Editing panel in the Home tab. Select **Selection Pane** from the drop-down menu that appears.



- b** Scroll to the bottom of the Selection Pane. Toggle layer visibility to match styles. The options outlined in dashed red dictate table style; the options outlined in solid blue dictate background style.

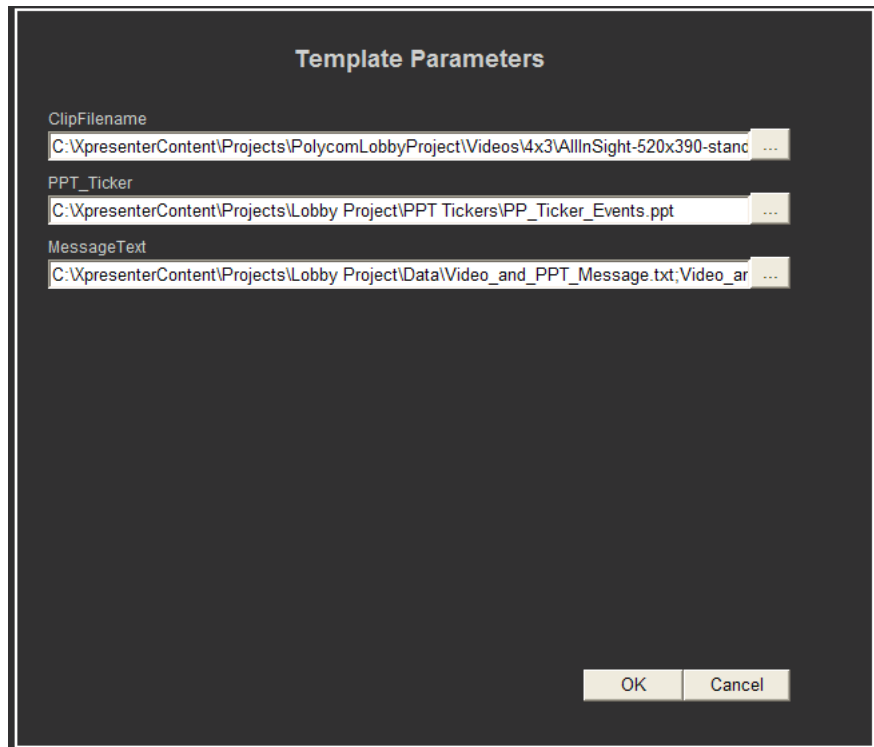


- 6** Once you have made your changes, save the PowerPoint slide and click **Open** in the selection dialog.
- 7** Click **OK** to complete template editing.

**AddOn Video Clip, PowerPoint, Message**

The AddOn Video Clip, PowerPoint, Message template displays a 4x3 video file, PowerPoint ticker, and text file. To configure an AddOn Video Clip, PowerPoint, Message template:

- 1 Click **Params**. The **Template Parameters** screen will appear.

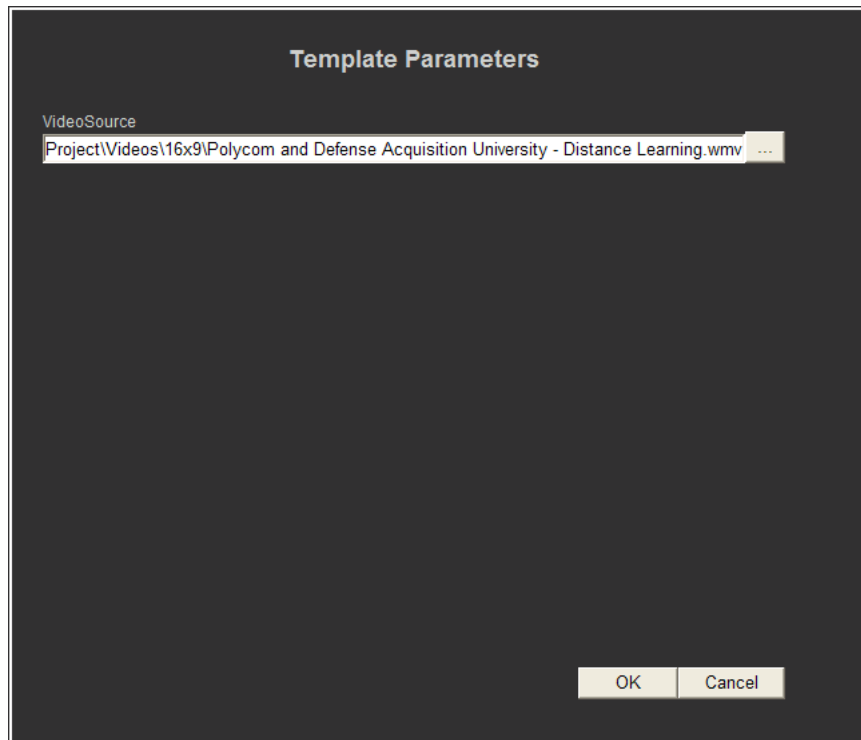


- 2 To add a video:
  - a Click the browse (...) button under **ClipFilename**.
  - b Choose a video file in the dialog that appears.
  - c Click **Open**.
- 3 To add a PowerPoint ticker:
  - a Click the browse (...) button under **PPT\_Ticker**.
  - b Choose a PowerPoint file in the dialog that appears.
  - c Click **Open**.
  - d You will be prompted to create a PowerPoint archive. Click **Yes**.
- 4 To edit the message text:
  - a Click the browse (...) button under **Message\_Text**.
  - b Select a text file in the dialog that appears.
  - c Click **Open**.
- 5 Click **OK**.

### AddOn Video Fullscreen

Displays a full-screen video. To add a video:

- 1 Click on the **Params** link. The template dialog window will appear.

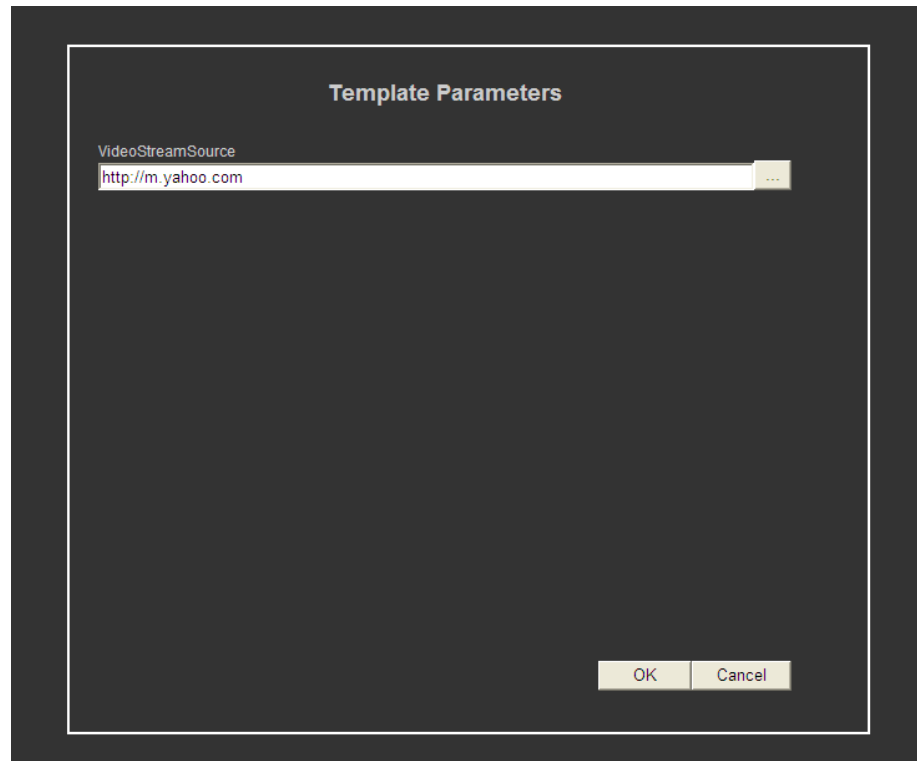


- 2 Click the browse (...) button. Choose a video file from your content directory and click **Open**.
- 3 Click **OK**.

### AddOn VideoStream

Displays a live video stream; if a non-video URL is designated, the template will display that URL. To add a video stream:

- 1 Click on the **Params** link. The template dialog window will appear.



- 2 Enter in the source URL for the website you would like to reference. Click **OK**. Once changes are made, save and distribute to the players.

### **Alert Fullscreen**

Displays an alert screen. See [Alerts](#) below.

### **Data Ticker Fullscreen**

Displays a data-driven news feed. To add:

- 1 Click on the **Params** link. The template dialog window will appear.

- a Click the **Add File** or ... button beside the Datasource field. Locate the .xsrc file on your computer and click **Open**.



**NOTE:** Please consult the [“Using the Data Parser”](#) on page 147 for more information on configuring .xsrc files.

- b Remove all pathway and file type information from the chosen file. The Datasource field should contain only the file name of the .xsrc file, without the file extension.

In our example,  
 C:\PolycomContent\Data\PolycomFeed\_PolycomFeed.xsrc  
 becomes PolycomFeed\_PolycomFeed in the Datasource field.

- c Provide a title and category for the Template.

- 2 Click **OK**.

### Lobby Crawl

Displays the crawling ticker. Once the ticker has been begun it will play throughout the Playlist. See [Crawling Ticker](#) below.

### PowerPoint Ticker LBar

Displays a PowerPoint ticker. For more information, consult [Slide Show Tickers](#) below.

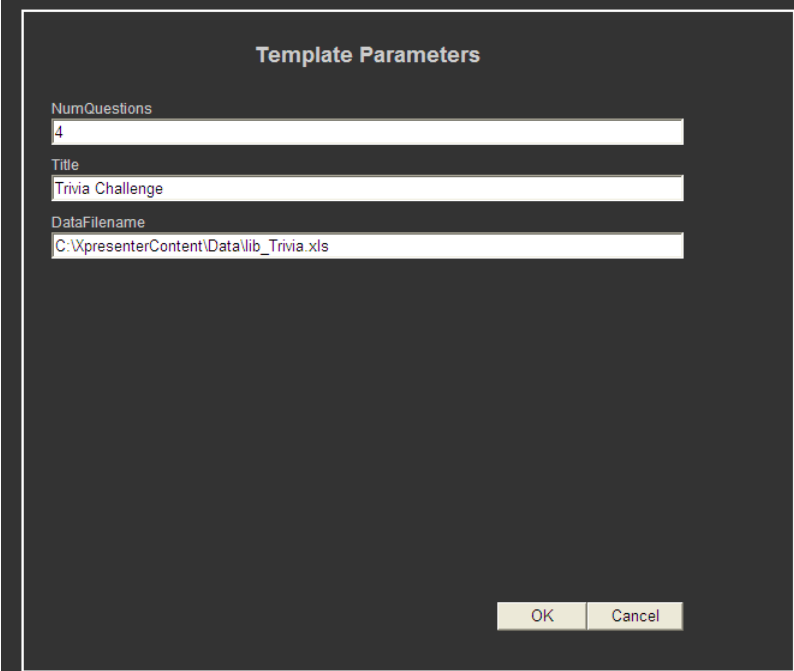
## Message Board

Displays the Message Board. For more information, consult [Message Board/Webcast](#) below.

## Trivia

Displays a Trivia sequence. To edit the Trivia questions and answers:

- 1 Click on the **Params** link. The Template Parameters window will appear.



The screenshot shows a dialog box titled "Template Parameters" with a white background and a dark border. It contains three text input fields. The first field is labeled "NumQuestions" and contains the number "4". The second field is labeled "Title" and contains the text "Trivia Challenge". The third field is labeled "DataFilename" and contains the path "C:\XpresenterContent\Data\lib\_Trivia.xls". At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

- 2 The **NumQuestions** field allows users to define the number of questions displayed on this template from the source Excel spreadsheet.  
The **Title** is the name that will be displayed on the template.  
The **DataFilename** is the source Excel spreadsheet which will be called for this application. The syntax of the file must be "lib\_Trivia.xls".
- 3 To customize the questions, open the **C:\XpresenterContent\Data** folder on your computer. Double-click on the **lib\_Trivia.xls** file.



**4** This will launch Excel and open the spreadsheet:

QUESTION	OPTION 1	OPTION 2	OPTION 3	OPTION 4	ANSWER
What kind of nut is an ingredient found in dynamite?	Walnut	Pecan	Peanut	Almond	Peanut
How many ways are there to make change for a dollar?	200	150	270	293	293
What fish is able to blink its eyes?	Shark	Sailfish	Trout	Tuna	Shark
Which animal has the largest eyes?	Giraffe	Blue Whale	Giant Squid	Polar Bear	Giant Squid
How many ridges are around the edge of a dime?	50	77	98	118	118
What is the average lifespan of a mayfly?	1 Day	1 Month	1 Week	2 Weeks	1 Day
What was the original task of the US Secret Service?	Stop Counterfeiting	Protect the President	Spy Operations	Protect the Postal Service	Stop Counterfeiting
What kind of acid is found in Coca-Cola?	Hydrochloric Acid	Citric Acid	Sulfuric Acid	Phosphoric Acid	Phosphoric Acid
What was Bug Bunny's original name?	Happy Rabbit	Jerome Rabbit	Bugs Big Ears	Hip Hop Hare	Happy Rabbit
What was the site of John the Baptist's baptisms?	The Mediterranean Sea	The Jordan River	The Sea of Galilee	The Red Sea	The Jordan River
How fast was the Titanic going when it hit the iceberg?	10 Knots	15 Knots	18 Knots	22 Knots	22 Knots

- 5** Type in your desired question under the **Question** row, four responses in the **Options** columns, and the correct response in the **Answer** column.
- 6** Save your changes in Excel.
- 7** Launch the Remote Manager application.
- 8** Click on **Publish Content**. The Publish Content wizard will appear. Please consult [“Publish New Content”](#) on page 33 for more information on using the wizard.
- 9** Add the lib\_Trivia.xls file. If it is not currently located with the C:\XPresenterContent\Data directory, you will need to designate this target pathway.
- 10** Click through the Wizard.
- 11** Select the Players or Group of players you want to target and distribute the file.
- 12** The Trivia template will now refer to the revised document.

**Video + PowerPoint**

The Video + PowerPoint template displays a full-screen webcast.

**Video 16x9**

Displays Windows Media, Quicktime, Flash (.swf), and H.264 video content in 16x9 widescreen format. See [Video Slide Content](#) below.

**Video 4x3**

Displays Windows Media, Quicktime, Flash (.swf), and H.264 video content in 4x3 standard format. See [Video Slide Content](#) below.

**Weather 3Day**

Displays a three-day weather forecast generated from a data feed.

## Crawling Ticker

The Crawling Ticker is an animated item that runs at the bottom of the Player screen. The ticker can be populated with user-designated text or with an automatically-generated feed of news stories, entertainment news, or sports news.

**Select Crawl Data Source:**

Manual

Manual  
Top Stories  
Entertainment News  
Sports Headlines

Apply

**Manual Crawl Text:**

Welcome to Polycom

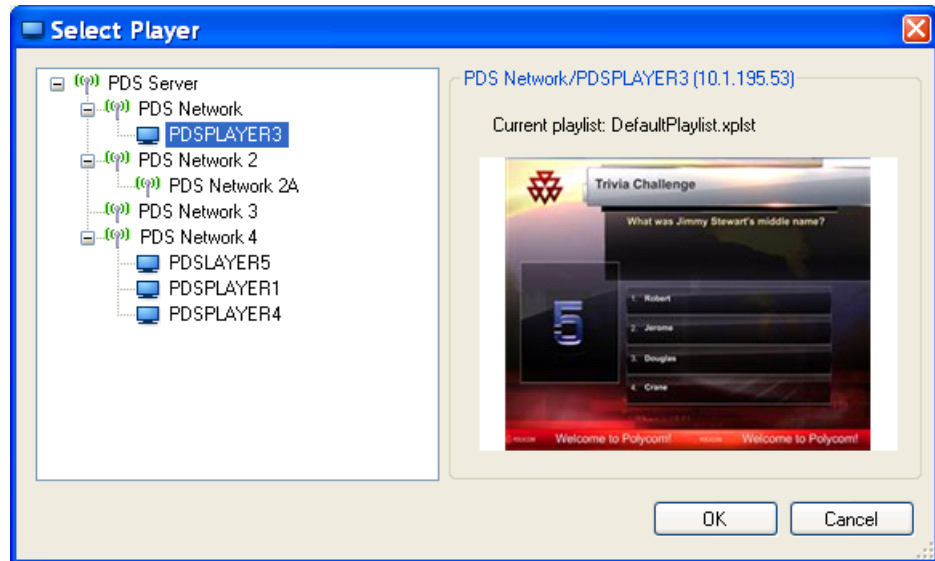
Save Update On Screen Retrieve From Player

### To change the crawling ticker:

- 1 Select a crawl data source from the drop-down menu. Click **Apply**.

- 2 If you have chosen a manual crawl, enter your message in the **Manual Crawl Text** field.

If you wish to fill the field with the crawl text currently running on a Player, click **Retrieve From Player**. The Player Retrieval screen will appear. Select a Player and click **OK**.



- 3 Click **Save**.
- 4 Click **Update on Screen**.



**Note:** It is always necessary to click **Update on Screen** in order to effect a configuration change on the target Player. However, although the change will appear on the target Player, your changes will not be saved without first pressing the **Save** button.

- 5 To remove the crawl from the PDS Player output, delete the **Lobby Crawl** template from your playlist.

## Slide Show Tickers

The Slide Show Tickers tab allows administrators to directly edit and replace frequently-updated elements of the playlist, the **Event Calendar**, **Product Catalog**, and **About Company Text**.

The screenshot displays the Slide Show Tickers interface with three main sections:

- Event Calendar:** Includes buttons for "Edit File", "Send", and "Retrieve From Player", a link for "Import PowerPoint File", and a checked checkbox for "Create PPT archive".
- Product Catalog:** Includes buttons for "Edit File", "Send", and "Retrieve From Player", a link for "Import PowerPoint File", and a checked checkbox for "Create PPT archive".
- About Company Text:** Features a text area containing the text: "About Polycom  
Polycom, Inc. (NASDAQ: PLCM) is the global leader in telepresence, video, and voice solutions and a visionary in communications that empower people to connect and collaborate everywhere." Below this text area are buttons for "Save", "Update Screen", and "Retrieve From Player".

### To update the Event Calendar and Product Catalog:

- 1 Click **Edit File** under the element you wish to change. PowerPoint will launch if it is not yet open.
- 2 The Event Calendar or Product Catalog .ppt will appear. Edit the PowerPoint file as necessary..



**Note:** the Event Calendar and Product Catalog PowerPoint tickers are named according to suggested use but can be freely administrator-defined depending on your needs.

Save the file and select the target Player. Do not alter the default save location.

- 3 If you wish to retrieve a Calendar running on a particular Player and redistribute to another Player, click **Retrieve from Player**.
- 4 Alternatively, if you wish to replace rather than edit the existing PowerPoint ticker, select **Import PowerPoint File**.

A warning will appear; select **Yes**, choose the file, and click **Open**. You will then be prompted to provide a target Player.

- 5 Select or unselect **Create PPT archive**. When selected, the PowerPoint file will be sent as a .jpg archive.



**Note:** If you do not have PowerPoint installed on the target Player, you *must* select **Create PPT Archive**.

- 6 Click **Send**. The archive will be created and you will be prompted to select a target Player again.

#### To edit the About Company text:

- 1 Edit the About Company text field. To retrieve the message from a particular player, click **Retrieve From Player**.



**Note:** Text longer than 500 characters (including spaces) will be unreadable in the About Company field.

- 2 Click **Save**. Then click **Update Screen**.

## Video Slide Content

The Video Slide Content tab allows changes to be made to the video template in the playlist. From this tab, users can edit the Sidebar Message, the Standard Format Video Clip List, and the Widescreen Video Clip List.

### Sidebar Message:

**Title:**

**Text:**

---

### Video Clip List (Standard Format 4x3):

[Add Clip](#) [Clear All](#)

1	AllInSight-520x390-standard.wmv	C:\XpresenterContent\Projects\PolycomLobbyProject\Videos\4x3\AllInSight-520x390-standard.wmv	↑	↓	Remove

This template is currently included in the playlist. Go to the Playlist tab to change this setting.

---

### Video Clip List (Widescreen 16x9):

[Add Clip](#) [Clear All](#)

#### To edit the Sidebar Message:

- 1 Edit the Title and Text fields as necessary.
- 2 Click **Save**. Then click **Update Screen**. The new Sidebar Message should appear.

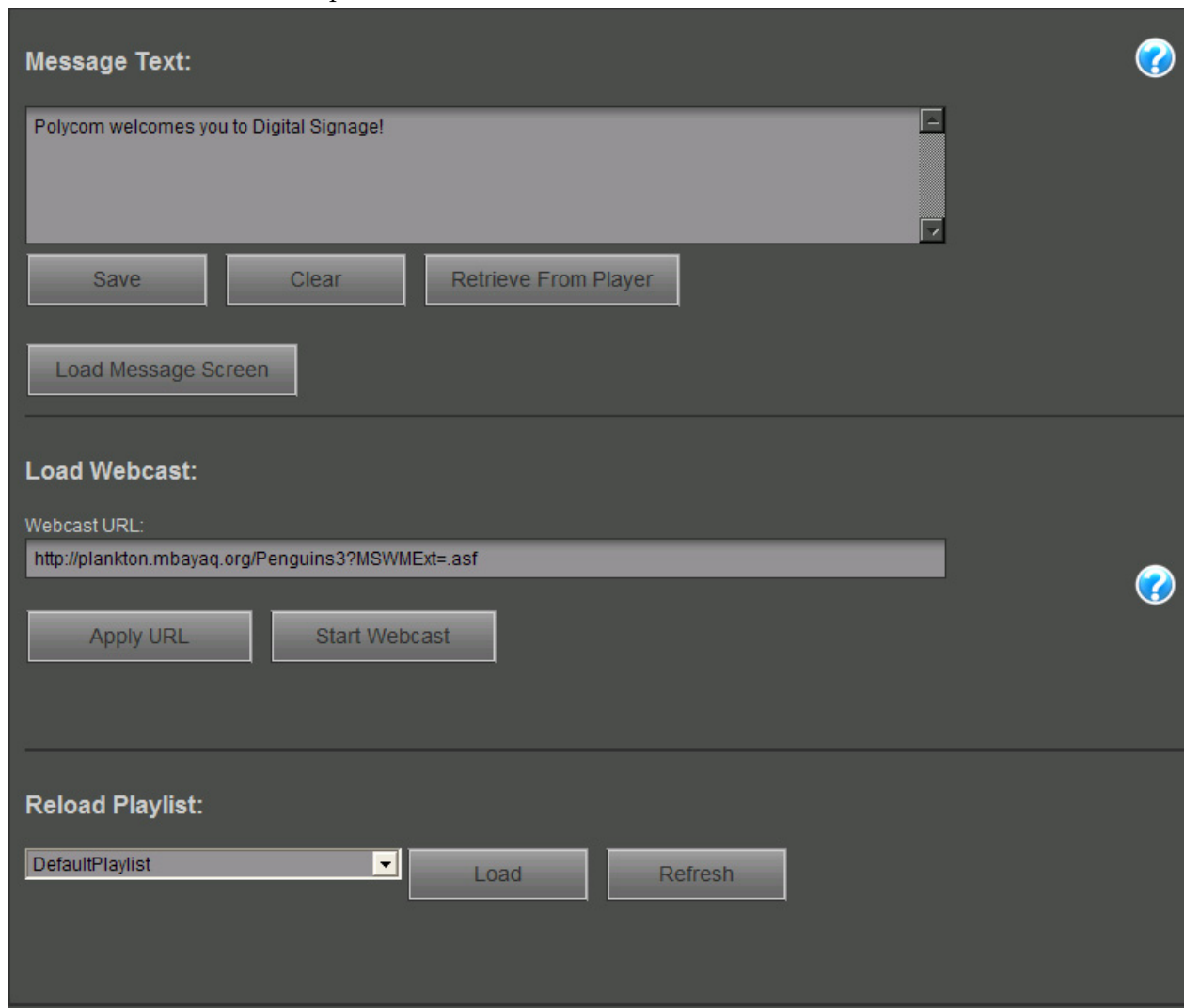
#### To edit the video clip lists:

- 1 To add a video file to the clip list, click **Add Clip**. You can then browse and select a file to add. Please ensure that the clip is a supported format (Windows Media, Quicktime, Flash (.swf), or H.264).

- 2 To change the order of appearance of the clips in the list, use the upward and downward-facing arrows to rearrange the clips.
- 3 To remove a selected clip, click **Remove**. To remove all clips from a list, click **Clear All**.
- 4 Click **Save Changes** to save changes to the clip list. Click **Load** to update the template and display your changes.

## Message Board/Webcast

The Message Board tab allows Content Managers to configure the Message Board playlist template or to stop the playlist and play a live webcast in its place.



The screenshot displays a web-based configuration interface for a Message Board. It is divided into three main sections:

- Message Text:** This section features a text area containing the message "Polycom welcomes you to Digital Signage!". Below the text area are three buttons: "Save", "Clear", and "Retrieve From Player". A "Load Message Screen" button is positioned below these.
- Load Webcast:** This section includes a "Webcast URL:" label and a text input field containing the URL "http://plankton.mbayaq.org/Penguins3?MSWMEExt=.asf". Below the input field are two buttons: "Apply URL" and "Start Webcast".
- Reload Playlist:** This section contains a dropdown menu currently set to "DefaultPlaylist", followed by "Load" and "Refresh" buttons.

Each section has a blue question mark icon in the top right corner, indicating help or information is available.

**To edit the Message Board:**

- 1 Edit the Text field as necessary. To remove all text from the field, click **Clear**.
- 2 Click **Save** to save the text in the field. To interrupt the playlist and show the updated Message Board, click **Load Message Screen**.  
To reload the playlist with the updated Message Board, click **Restart Playlist**.

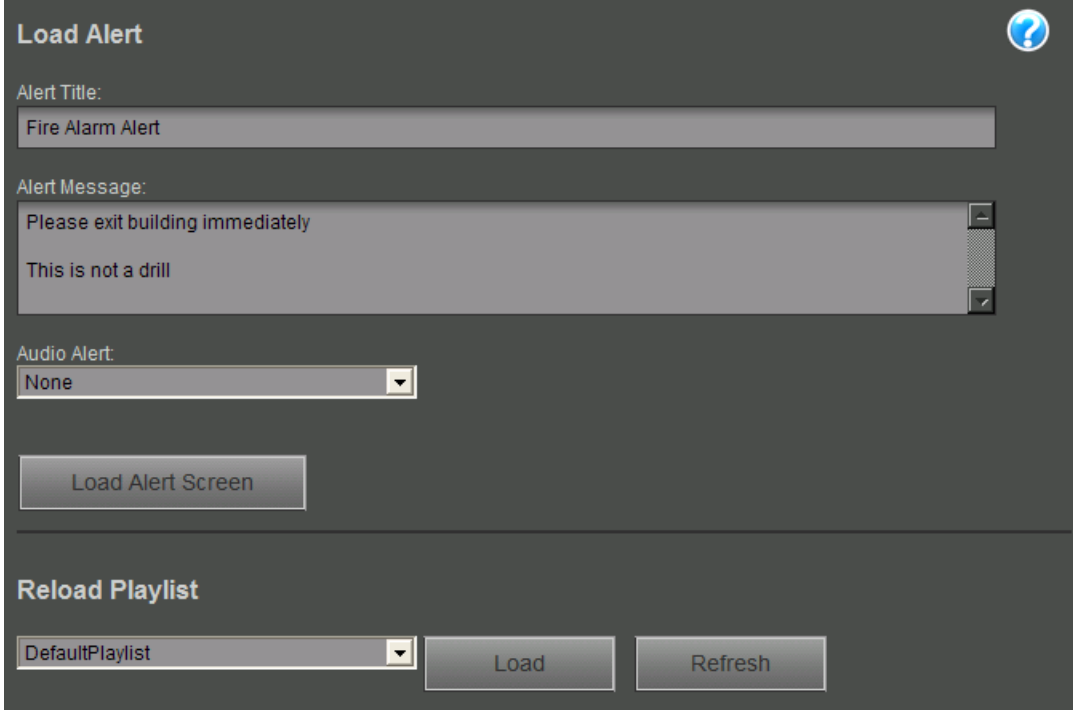
**To load a webcast:**

- 1 Indicate the URL of the webcast stream. Please note that the webcast should be in Windows Media Player-compatible format.
- 2 Click **Apply URL**. Choose a target Player from the selection wizard.
- 3 Click **Start Webcast**. The webcast will start to play.
- 4 When the webcast has concluded, navigate to **Reload Playlist**. Choose a Playlist to play and click **Load**. Click **Refresh** to restart the given playlist once it is running.



## Alerts

The Alert tab allows content managers to stop the playlist to display an alert screen.



The screenshot shows a web interface for managing alerts and playlists. It is divided into two main sections: 'Load Alert' and 'Reload Playlist'.

**Load Alert Section:**

- Alert Title:** A text input field containing 'Fire Alarm Alert'.
- Alert Message:** A text area containing 'Please exit building immediately' and 'This is not a drill'.
- Audio Alert:** A dropdown menu currently set to 'None'.
- Load Alert Screen:** A button to apply the alert settings.

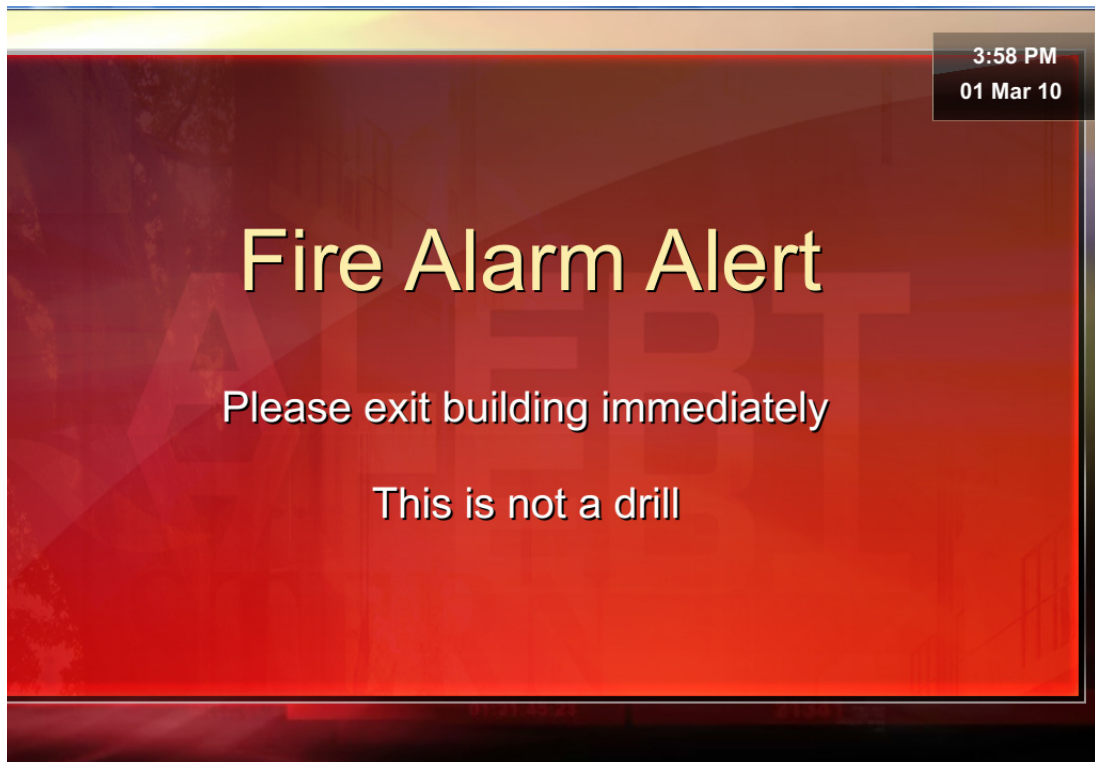
**Reload Playlist Section:**

- DefaultPlaylist:** A dropdown menu currently set to 'DefaultPlaylist'.
- Load:** A button to load the selected playlist.
- Refresh:** A button to refresh the playlist.

### To broadcast an alert:

- 1 Edit the Alert Title and Alert Message text fields as necessary.
- 2 Choose whether to play one of the default Audio Alerts as well.

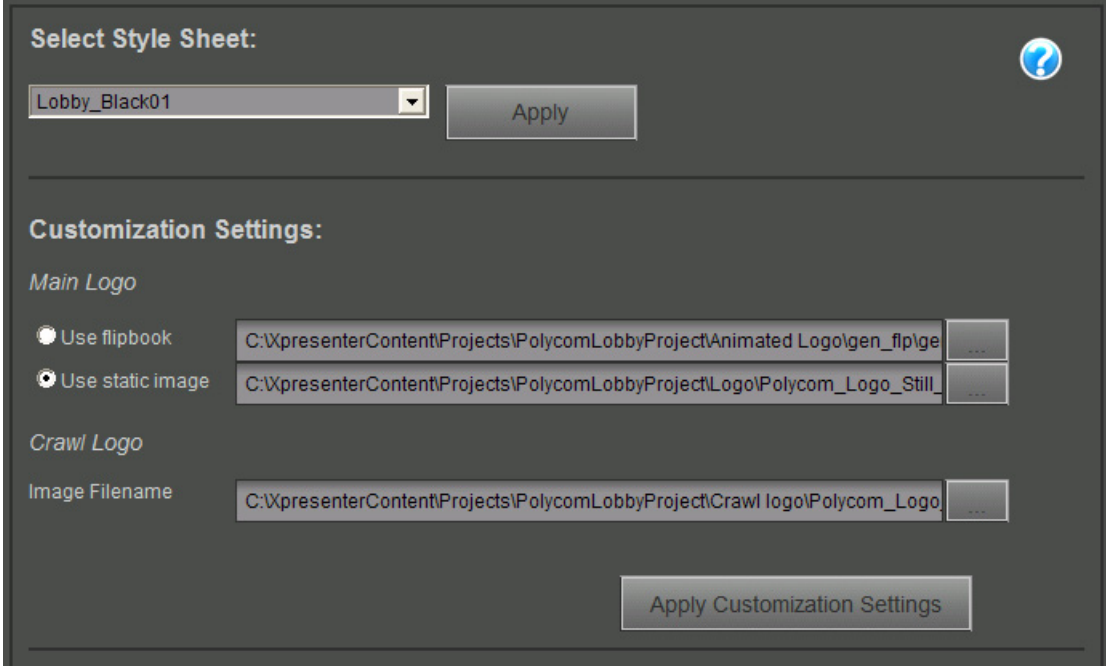
- 3 Click **Load Alert Screen** and choose a target Player. The alert will display.



- 4 When the alert is no longer necessary, click **Restart Playlist**.

## Settings

The Settings tab allows you to simply apply overarching customizations to your playlist.



The screenshot displays the 'Settings' interface. At the top, there is a section titled 'Select Style Sheet:' with a dropdown menu currently showing 'Lobby\_Black01' and an 'Apply' button to its right. A help icon (question mark in a circle) is located in the top right corner of this section. Below this is the 'Customization Settings:' section. Under the sub-heading 'Main Logo', there are two radio button options: 'Use flipbook' and 'Use static image'. The 'Use static image' option is selected. Each option has a text input field containing a file path and a browse button (three dots). The 'Use flipbook' path is 'C:\XpresenterContent\Projects\PolycomLobbyProject\Animated Logo\gen\_flip\ge' and the 'Use static image' path is 'C:\XpresenterContent\Projects\PolycomLobbyProject\Logo\Polycom\_Logo\_Still'. Under the sub-heading 'Crawl Logo', there is an 'Image Filename' label and a text input field with the path 'C:\XpresenterContent\Projects\PolycomLobbyProject\Crawl logo\Polycom\_Logo' and a browse button. At the bottom right of the customization section is a large 'Apply Customization Settings' button.

### Style Sheet

A set of default style sheets come pre-configured with Polycom Digital Signage solution. These stylesheets apply to all templates within a playlist. To apply a new style sheet from among these default options, select an item from the drop-down menu and click **Apply**.

### Customization

Administrators can replace the default logo with a custom logo. For the logo in the upper right, users can choose between a flipbook animation and a static image. To browse for an file, click the “...” link next to the existing file.

Administrators can also replace the logo that runs in the ticker configured in the Crawling Ticker tab.

When all customization changes have been made, click **Apply Customization Settings**.



---

# Using Template Maker

This chapter explains the interface and use of the Polycom Template Maker.

This chapter contains the following sections:

- [About Polycom Template Maker](#)
- [Installing Template Maker](#)
- [Licensing Template Maker](#)
- [Navigating the Template Maker Interface](#)
- [Template Maker Output Settings](#)
- [Adding and Working with Slides](#)
- [Adding and Editing Text, Images, and Media](#)
- [Adding and Editing a Crawl](#)
- [Adding Clocks and Tickers](#)
- [Saving a Template](#)

## About Polycom Template Maker

Polycom Template Maker allows users to work directly with Microsoft PowerPoint 2003 to develop templates for use in Polycom Digital Signage playlists. Template Maker can be used to create organization-, department-, or event-specific templates, with objects such as live video, video files, animations, tickers, and data feeds.

## Installing Template Maker

- 1 Find the Polycom Digital Signage Template Maker installer in the C:\software directory on the Polycom Digital Signage Server.
- 2 Distribute this file to your computer.

- 3 Double click on the PDS Template Maker setup .exe file. The PDS Template Maker setup screen appears. Click **Next**.
- 4 Designate a destination for the file. The default directory, C:\Program Files\Polycom\PDS Template Maker, is recommended. Click **Next**.
- 5 Choose a folder to appear in the Start Menu. Click **Next**.
- 6 A review screen will appear. Click **Install**.
- 7 Double click on the PDS Template Maker desktop icon to begin.

## Licensing Template Maker

- 1 From the Windows Start menu, choose **Programs > Polycom Digital Signage > PDS TemplateMaker**.

Polycom Template Maker will launch.

- 2 In the Template Maker companion window, open **Tools > License Manager**.

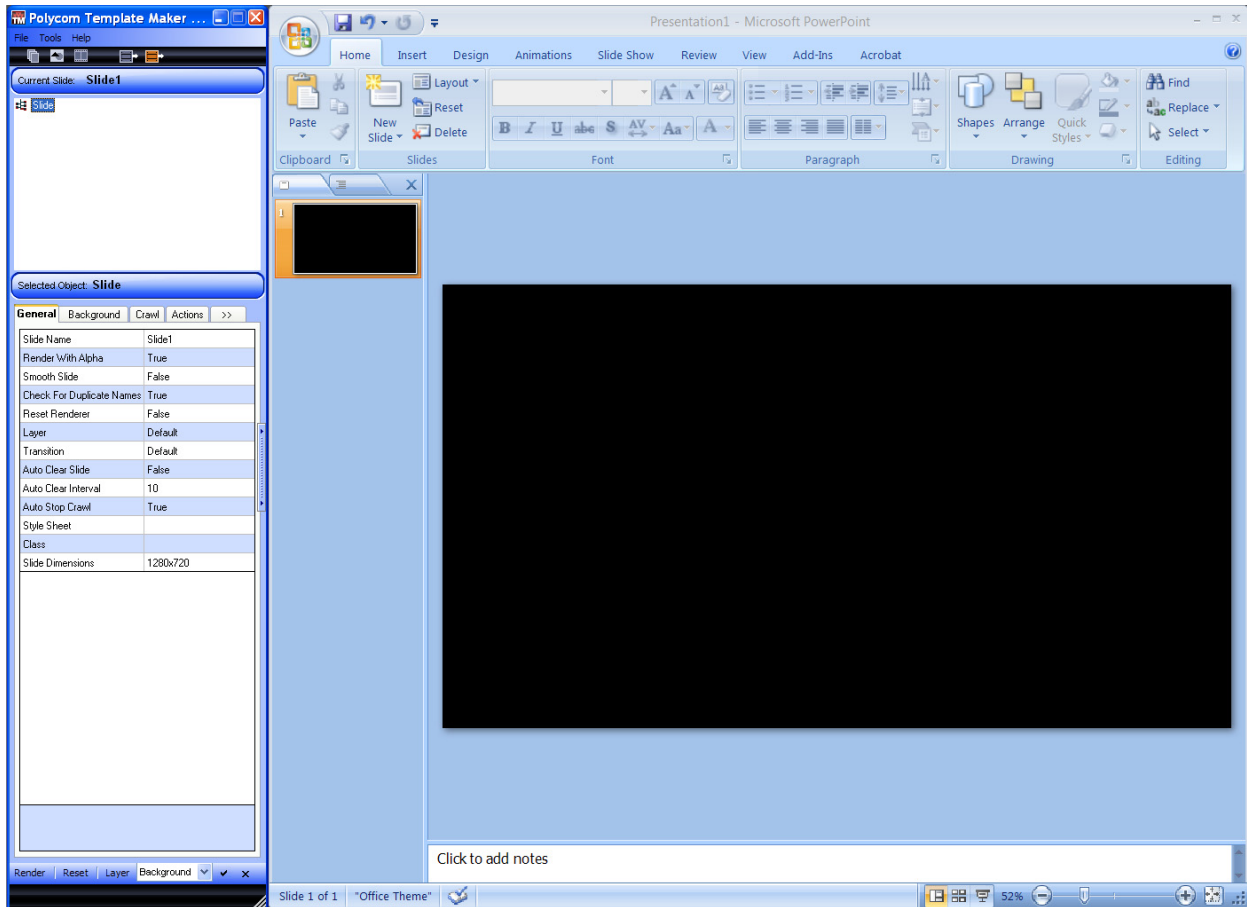
The License Manager will appear.



- 3 Enter the **License Key** you have used for the other items in your Polycom Digital Signage solution. Click **OK**.
- 4 Template Maker should now be licensed.

# Navigating the Template Maker Interface

The Polycom Template Maker interface consists of two main sections: the Polycom Template Maker tool and the Microsoft PowerPoint interface that launches beside the Template Maker companion window..



This document assumes familiarity with the Microsoft PowerPoint interface.

## The Template Maker Companion Window

The diagram below depicts the Template Maker companion window as it will appear upon first launching Template Maker.

**Toolbar**

*Save Slide as Template*

*Save Slide as Object*

*Insert Flipbook*  
Launches a dialog for viewing and controlling flipbook animations.

*Insert Image*  
Launches a dialog for importing an image to the current slide.

*Insert Media*  
Launches a dialog for selecting and previewing live video or a video clip for insertion to a slide.

**Current Slide Area**  
Displays the name of the current slide and shows a tree view of all elements contained within a given slide.

**Selected Object Area**  
Displays and permits modification of properties specific to the object selected in the PowerPoint slide, or properties of the currently active slide.

**Layer**  
Selects which rendering layer is currently active, and to which layer objects contained in the PowerPoint slide will be rendered.

*Reveals the layer specified in the Layer drop-down.*

*Hides the layer indicated in the Layer drop-down.*

**Render**  
Renders the current slide in the CG Renderer window.

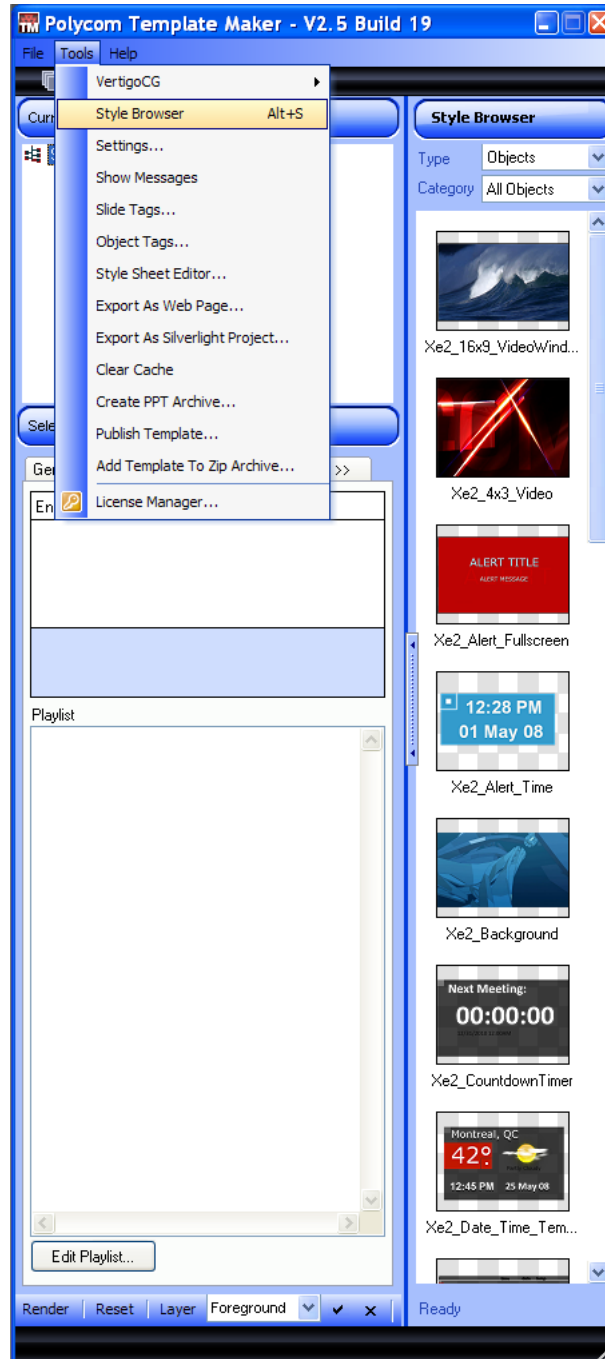
**Reset**  
Resets the output.

Selected Object: Slide	
General Background Crawl Actions >>	
Slide Name	Slide1
Render With Alpha	True
Smooth Slide	False
Check For Duplicate Names	True
Reset Renderer	False
Layer	Default
Transition	Default
Auto Clear Slide	False
Auto Clear Interval	10
Auto Stop Crawl	True
Style Sheet	
Class	
Slide Dimensions	1280x720



## Style Browser

To launch the Style Browser, navigate to **Tools > Style Browser**.



Select a **Type** from the drop-down menu:

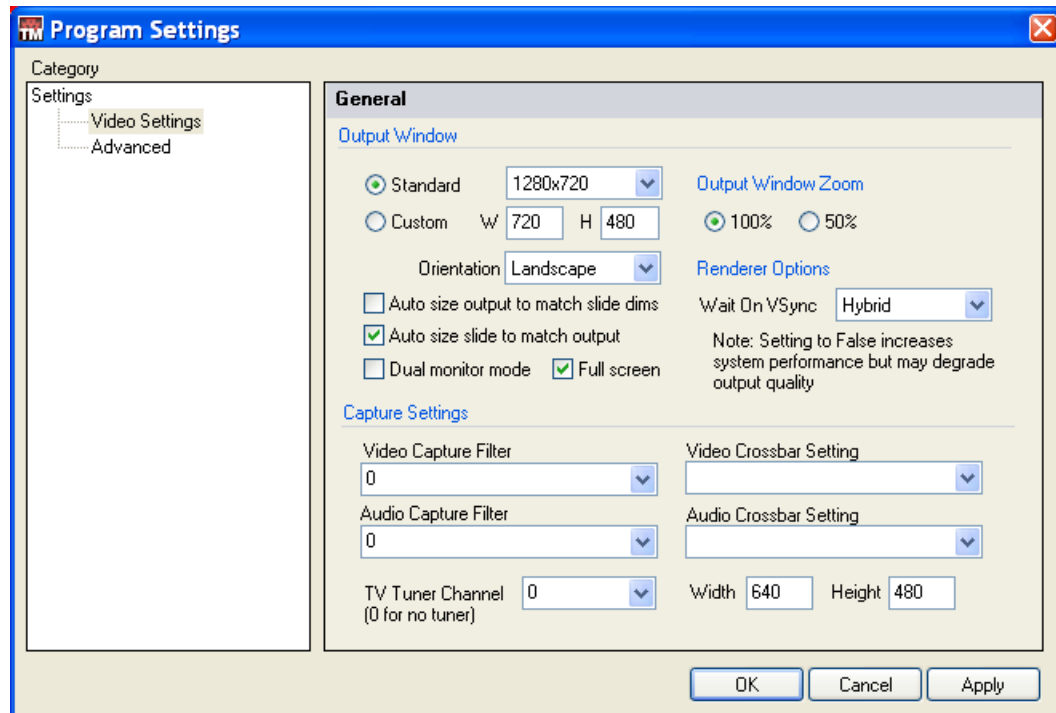
- **Text:** Displays available text styles. In the Category box, choose from the list of categories.

- **Objects:** Displays available graphic objects for each category. Some objects include links to live data. In the Category box, choose from the list of categories.
- **Templates:** Displays completed templates. In the Category box, choose from the list of categories.
- **Images:** Displays available image files, for example .jpg, .tga, .bmp. The Type box displays folders you can browse for selecting images. No categories are available for Images.
- **Clips:** Displays available video clips, for example .wmv, .avi, .mpeg. The Type box displays folders you can browse for clip selection. No categories are available for clips.

## Template Maker Output Settings

The Template Maker rendering window should be configured prior to use. To launch the Settings dialog, navigate to **Tools > Settings...**

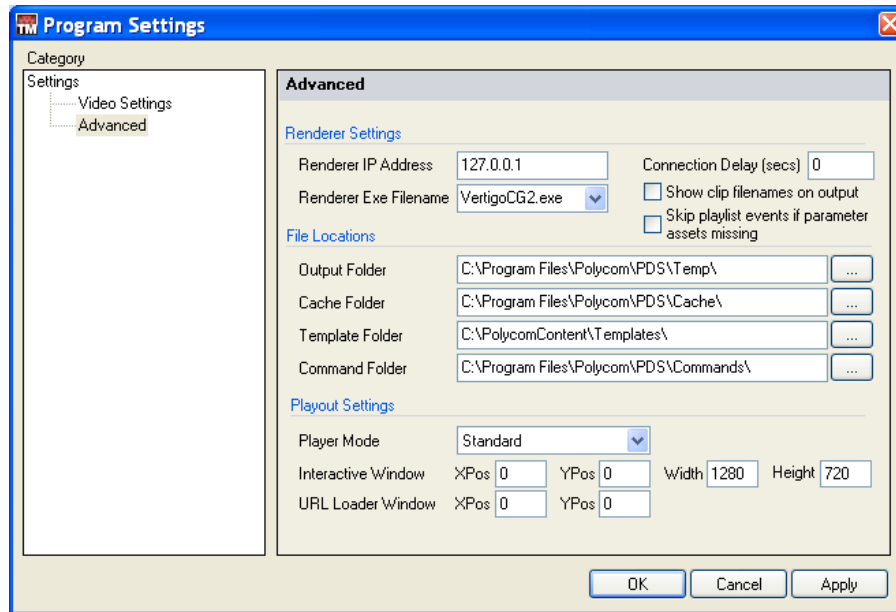
### Video Settings



The Video Settings section includes the following configuration options:

- **Standard:** Specifies the dimensions of the video output window. Choose from a list of standard resolutions: 640x480, 720x480 (DV-NTSC), 720x486 (NTSC SMPTE), 720x576 (PAL), 800x600, 1024x768, 1280x720, 1280x1024, 1600x1200, and 1920x1080.
- **Custom:** Specifies the dimensions of the video output window according to the specified Width (W) and Height (H).
- **Orientation:** Specifies whether the video output window should be displayed in either Landscape or Portrait format, in conjunction with the Standard or Custom output window dimensions.
- **Auto size output to match slide dims:** When selected, the resolution of the video output window will scale to match the slide template dimensions.
- **Auto size slide to match output:** When selected, the resolution of the slide template is automatically scaled to match the resolution of the video output window.
- **Dual monitor mode:** When selected, configures the PDS Player display output to appear on a second monitor. This mode can also be used for cloning the display. This supports multiple monitors from one Player. See the *Polycom Digital Signage Player Getting Started Guide* for more details.
- **Full screen:** When selected, the PDS Player output will be displayed in full screen mode (either on the primary or secondary display). When unselected, the PDS Player output will be displayed in a separate window.
- **Output Window Zoom:** Select to resize the CG Rendering window to 100% (full size) or 50% half size when the Full screen mode is disabled.
- **Wait on VSync:** Depending on the features and the performance of your system's graphics card adapter, select one of the following options:
  - **True:** Significant loss of system performance with a high-quality graphics output result.
  - **Hybrid:** Improved system performance with some loss in the quality of the graphics output result.
  - **False:** Best possible performance with a low-quality graphics output result.

## Advanced Settings



### Renderer Settings

The Renderer Settings options of Advanced Settings are described as follows:

- **Renderer IP Address:** Displays the IP address of the rendering engine.
- **Renderer Executable Filename:** Displays the executable filename that corresponds to the PDS rendering engine.
- **Connection Delay:** Displays the delay, in seconds, from the time you click the Render button until the scene is submitted CG rendering engine.

### File Locations

The File Locations configuration in Advanced Settings allow users to dictate which directories the PDS Player uses:

- **Output folder:** Displays the folder to which the CG Renderer sends rendered output that is displayed in the output monitor.
- **Cache folder:** Displays the folder to which the CG Renderer caches information while rendering the output.
- **Template folder:** Displays the default folder to which the PDS Player saves exported templates.
- **Command folder:** Displays the folder to which the commands are stored on the system for use with other PDS applications such as Remote Manager, or Web Screens.

## Playout Settings

The Playout Settings of the Advanced Settings are as follows:

- **Player Mode box:**
  - **Standard:** Configures the PDS Player to function as an authoring station.
  - **Interactive:** Configures the PDS Player to function as an interactive/kiosk station.



**NOTE:** Interactive mode is *not supported* in most implementations. Please do not select this option without input from Polycom support.

- **Interactive Window:** When in Interactive Player Mode, defines the topmost and leftmost location (XPos/YPos) and size (Width/Height), in pixels, of the interactive window.
- **URL Loader Window:** When displaying an internet browser window, defines the topmost and leftmost location (XPos/YPos) in pixels, of the Loader window.

## Reviewing Template Maker Settings

After setting the Template Maker renderer settings, users should verify that the renderer is functioning properly with system hardware.

### To verify renderer settings:

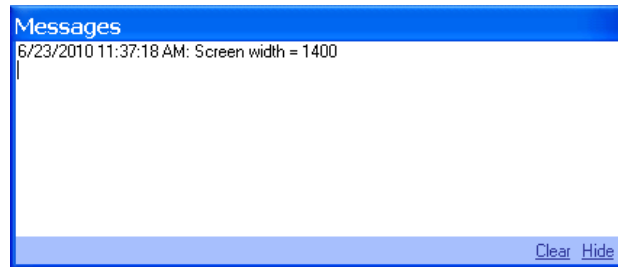
- 1 To load a PowerPoint presentation, in the PowerPoint main menu, choose **File > Open**.
- 2 Browse to a PowerPoint presentation (.ppt) on your computer and choose **Open**.
- 3 In Template Maker, click the **Render** button from the lower left corner of the screen.

The current slide is taken to the preview window, either to the second display or to the CG Renderer window.

- 4 If the presentation renders correctly, click ALT-ESC to exit the renderer.
- 5 If the presentation fails to render and an alert appears at the bottom of the Template Maker interface, as pictured below, click the alert icon.



- The Messages dialog will appear.



Review the information and correct your configuration as necessary.

## Adding and Working with Slides

Slides comprise all the assets, scripts, and data used to create a complete PDS template. While individual assets may have their own properties, slides may themselves include functions that modify content as it appears on-screen. All properties added to a slide are slide-specific.

### Modifying General Slide Properties

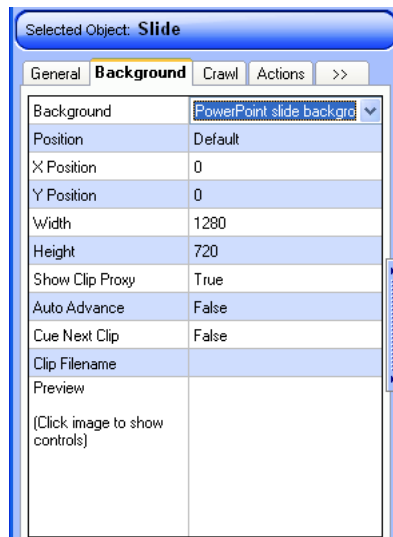
Polycom Template Maker lets you customize the options available to slides. To access these properties, select the slide you wish to modify. The name Slide appears in the Selected Object area.

The general properties associated with a slide are defined as follows:

- Slide name** – Name used to reference the slide within the digital signage solution.
- Render With Alpha** – If set to True, each slide element is rendered individually. Objects that contain alpha channels are composited against a background as expected. If set to False, the slide is rendered as a single image.
- Smooth Slide** – If set to True, additional anti-aliasing will be applied to the slide when rendered (when Render with Alpha is set to False).
- Check For Duplicate Names** – If set to True, the slide will be checked for duplicate object names. If objects have the same name, Template Maker will automatically reassign an unused name to the object to avoid potential issues that may occur with scripts or actions.
- Reset Renderer** – If set to True, the CG renderer is reset (cleared) prior to the slide render.
- Layer** – Layer that the slide is rendered on.
- Transition** – Apply a transition to the current slide when navigating to another slide. Transitions from which you can select include Cut, Fade, Crossfade, Push Right, and Push Left.

- **Auto Clear Slide** – If set to True, the slide will be cleared from the rendered output after a specified interval.
- **Auto Clear Interval** – The time, in seconds, after which a slide will be automatically cleared from the rendered output (if Auto Clear Slide is set to True).
- **Auto Stop Crawl** – If set to True, crawls will be cleared along with the slide during an Auto Clear Slide operation. If set to False, crawls remain on-screen when the content of the slide is cleared from the rendered output.
- **Slide Dimensions** – Resolution, in pixels, of the slide’s drawing canvas.
- **Set Slide Dimensions button** – Opens the Slide Dimensions dialog box in order to configure the slide’s drawing canvas.

## Modifying Background Slide Properties



The background properties associated with a slide are defined as follows:

- **Background** – Determines what is displayed as the background when the slide is rendered. Options available are Live Video Input, Video Clip, PowerPoint slide background, No background. See directions following for more information.
- **X Position** – Horizontal positioning of the slide background, in pixels (when Position is set to Custom).
- **Y Position** – Vertical positioning of the slide background, in pixels (when Position is set to Custom).
- **Width** – Width of the slide background, in pixels (when Position is set to Custom).
- **Height** – Height positioning of the slide background, in pixels (when Position is set to Custom).

- **Show Clip Proxy** – If set to True, displays a thumbnail from a selected video clip as the background of the slide (when Background is set to Video Clip). If False, color bars are shown instead.
- **Auto Advance** – If set to True, automatically advance to the next event in the playlist when the background video clip ends (when Background is set to Video Clip). Also overrides specified slide duration settings.
- **Cue Next Clip** – If set to True, cues the next clip in the playlist in memory for use as a background (when Background is set to Video Clip).
- **Clip Filename** – Opens the Select File dialog box in order to select a background video clip (when Background is set to Video Clip).
- **Preview** – Shows a thumbnail preview of the video to be used as a slide background. Click the image to show video playback controls in order to preview the video.

**To import a video as a slide background:**

- 1 Choose Video Clip from the Background option.
- 2 In the Clip Filename area, select the browse button.  
The Select File dialog box appears.
- 3 To import a video clip from the Content Library, select the Content Library icon and browse to choose a video clip and click OK.  
The selected video clip appears in Clip Filename.
- 4 To import a video clip from another location on your system, select the All Files icon and browse to choose a video clip and click OK.  
The selected video clip appears in Clip Filename.

**To receive a live video input signal as a slide background:**

Choose Live video input from the Background option.

The video source driving the background video is defined in the section Capture Settings of Template Maker Program Settings.

A 3rd-party capture device is required to receive live video input from an external video device.

**To use the PowerPoint background settings as a slide background:**

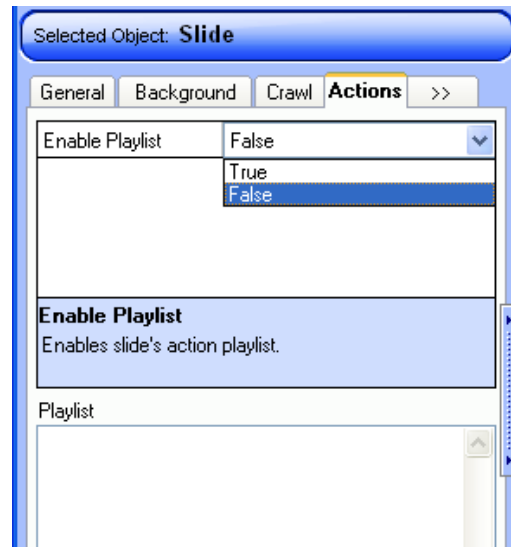
- 1 Choose PowerPoint slide background from the Background option.
- 2 In PowerPoint, choose Format | Background...
- 3 In the Background dialog box, select a color, fill, or texture to use as a background.



- 4 Position – Position and size of background. Options available are Default, Custom.

## Modifying Actions on a Slide

Slide actions let you automatically perform certain scripted functions when a slide loads. A series of actions can be created to form an action playlist.



The actions associated with a slide are defined as follows:

- **Enable Playlist** – If set to True, enables a slide's action playlist.
- **Edit Playlist button** – Opens the Playlist Editor, letting you add, modify, and specify the duration of actions.

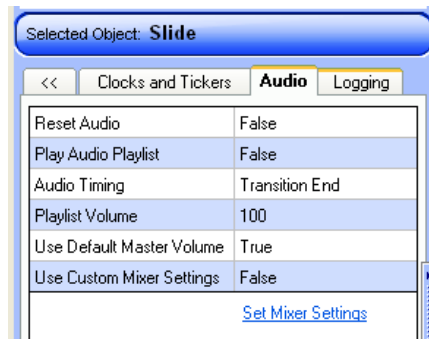
### To add an action to a slide:

- 1 In the Actions tab of the slide properties, set **Enable Playlist** to **True**.
- 2 Select **Edit Playlist...** The Playlist Editor dialog box appears.
- 3 To add an action, click **Add**. The Command Builder dialog box appears.
- 4 From the list of Available Commands, double-click on a command. If the command has customizable parameters, the Command Parameters dialog box appears.
- 5 Configure the parameters as desired and choose **OK**. The Command appears in the Selected Command area.
- 6 To edit the selected command, click **Edit...**
- 7 To adjust the start time of the selected command, modify its time by adjusting the H (Hour) /M (Minute) /S (Seconds) properties.

- 8 Choose **OK** to close the Command Builder dialog box. The action appears in the Playlist Editor.
- 9 To delete a command, select a command in the Playlist Editor and choose **Delete**.
- 10 To edit a command, select a command in the Playlist Editor and choose **Edit**, or double-click on the command.
- 11 Choose **OK** to close the Playlist Editor. The list of commands appear in the Playlist area.
- 12 To edit the playlist, choose **Edit Playlist...**

## Adding Audio to a Slide

The Polycom Digital Signage solution supports .mp3, .wma, and .wav audio formats. Add as many audio files as you like to the audio playlist. The audio properties associated with a slide are defined as follows:



- **Reset Audio** – If set to True, automatically stops any previous audio that is playing when the slide is rendered to the output.
- **Play Audio Clip** – If set to True, plays audio clip(s) added to the Audio Playlist.
- **Loop** – If available and set to True, loops audio added to the Audio Playlist.
- **Auto Advance** – If available and set to True, automatically advances to the next playlist event when the audio playlist ends.
- **Playlist Volume** – Audio playback level (from 0-100).
- **Use Default Master Volume** – If set to True, uses default master volume defined by the Master Volume setting.
- **Use Custom Mixer Settings** – Applies settings created in the Mixer to audio in the playlist.

### To add an audio clip to the slide's Audio Playlist:

- 1 In the Audio Playlist area, choose **Add File**. The Select File dialog box appears.

- 2 To browse to an audio clip on disk, click the browse button. A standard file explorer dialog box appears.
- 3 Select an audio file and choose **Open**. The audio file appears in the Audio Playlist.
- 4 To preview the audio file, select the file from the Audio Playlist and choose **Preview**.
- 5 To remove the audio file, select the file from the Audio Playlist and choose **Remove File**.
- 6 To add another audio file to the Audio Playlist, choose **Add File**.
- 7 To change the playlist order of audio in the Audio Playlist, select a file and press CTRL+up or CTRL+down as desired.

## Adding and Editing Text, Images, and Media

The following section will outline how to use the tools in Template Maker to augment the template-creation tools within PowerPoint.



**NOTE:** Please note, when working with text, that unlike other objects in a template, text remains a consistent size in Template Maker and the Polycom Digital Signage display. It will **not** resize in the renderer. Render a template with text from Template Maker before using it in a playlist.

### General Object Properties

The property configuration possibilities detailed in this section are identical for all objects in Template Maker.

Selected Object: TextBox 12	
General	Text Properties
Display Name	TextBox 12
Full Name	TextBox 12
Type	msoTextBox
Visible	True
Opacity	255
Render On Output	True
Left	190
Top	90
ZPos	0
Width	72
Height	72
Update Effect	Cut
Effect Speed	Default
Class	

The general properties associated with an object are defined as follows:

- **Display Name** – Name used to reference the object within the digital signage solution.
- **Full Name** – Full name of object used internally by Microsoft PowerPoint.
- **Type** – PowerPoint object type.
- **Visible** – Specifies whether the object is visible in PowerPoint and on the PDS output.
- **Opacity** – Specifies the transparency level of the object when viewed on the PDS output. Setting the Opacity level does not affect the appearance of the object in the PowerPoint slide.
- **Render On Output** – Determines whether or not the object is displayed on the PDS output when the slide is rendered
- **Left** – X-coordinate of left side of object (in pixels).
- **Top** – Y-coordinate of top side of object (in pixels).
- **Width** – Object width (in pixels).
- **Height** – Object height (in pixels).
- **Update Effect** – Specifies transition effect to use when object is updated dynamically. Render on output must be enabled. The following options are available:
  - **Cut** – No effect is applied. This is the default setting.
  - **Fade** – Fades up the image as the slide is updated.
  - **Crossfade** – Fades between the last state of the image and the updated image.
  - **ScaleX** – Stretches the object along its width (X-axis).
  - **ScaleY** – Stretches the object along its height (Y-axis).
  - **ScaleXY** – Stretches the object proportionately along its width and height (X-axis and Y-axis are scaled). The resulting effect looks as though the image is approaching the viewer from or flying away into the background.
- **Effect Speed** – Speed of Update Effect transition. The following options are available:
  - **Slow** – Effect proceeds at a slow pace.
  - **Fast** – Effect proceeds at a fast pace.

## Working with Text

After adding a text box to a slide in the PowerPoint section of the Template Maker interface, users can configure the text further using the tools in companion window.

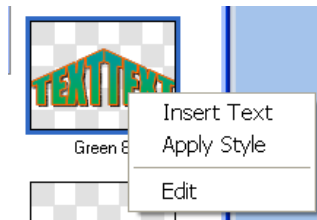
Users can also add new text.

## Applying a Text Style

With the Text Style Browser, you can apply text styles to text in text objects, and create a text object from an existing text style.

### To apply a text style to a PowerPoint object:

- 1 Create a text box in your PowerPoint presentation.
- 2 Enter any text. (This text will be replaced upon applying the style.)
- 3 In the Style Browser, choose Text from the Type box.
- 4 Choose a category from the drop-down menu.
- 5 Browse the text styles. Right-click the style in the browser and choose Apply Style.



- 6 The text style is applied to the text. Edit the text box as necessary in PowerPoint.

### To create a text object from the Style Browser:

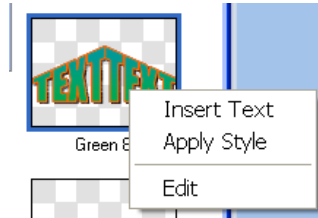
- 1 In the Style Browser, choose Text from the Type box.
- 2 Choose a category from the drop-down menu.
- 3 Browse the text styles and click a style of your choice.
- 4 Right-click the selected style and select **Insert Text**. Alternatively, double-click the given style.
- 5 A text box with the selected style will appear in the center of the slide. Edit the text box as necessary in PowerPoint.

### To add new text styles to the Style Browser:

As you customize the look and feel of a text object so that it conforms to the style of your current production, you will most likely want to reuse the text style on subsequent slides. You can easily add a text style to the Style Browser.

The Text Style Gallery has its own PowerPoint file—named `StylesText_Default.ppt`—which you must open to add a new style. You then copy the newly designed text object from the PowerPoint file in which you are working to the Text Style Gallery PowerPoint file.

- 1 In the Style Browser, be sure **Text** is selected as the Type and right-click.



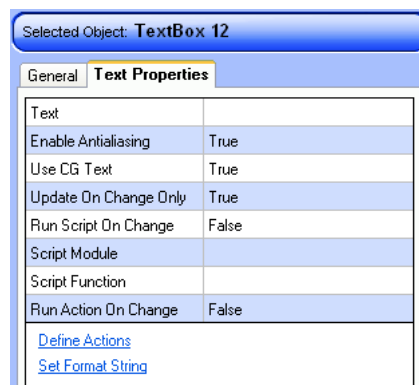
- 2 From the menu that appears, choose **Edit**.

The Style Browser PowerPoint file named StylesText\_Default.ppt opens. Notice the Slides tab contains each Text Style as an individual slide. You will copy your slide with the text object and paste it here.

- 3 Return to the text object slide in your file. In the PowerPoint main menu, choose **View > Switch Windows > your filename**.
- 4 In the Slides tab, select the slide that contains the newly stylized text object.
- 5 Right-click and choose **Copy**.
- 6 In the PowerPoint main menu, choose **View > Switch Windows > StylesText\_Default**.
- 7 Create a new slide in the StylesText\_Default file.
- 8 Paste your text object into this slide.
- 9 Choose **File > Save** to save the StylesText\_Default file and then close the file.

The Text Style Gallery is updated with your new text style.

## Modifying Text Properties



The Text Properties tab reveals options associated specifically with a text box, and are defined as follows:

- **Text** – Character string of text being displayed in the text box. To modify the contents of the text box from Template Maker, do the following:

- a** In the Text Properties tab of the selected text box, click the **Text** field. The entire string of text is highlighted.
- b** Enter the text you wish to place into the text box.
- c** Press **Enter**.
- **Enable Antialiasing** – When set to true, edges of text are smoothed.
- **Use CG Text** – If set to True, use the PDS CG rendering engine to render text. This option must be set to true for dynamic text objects such as tickers. Some PowerPoint text formatting may be lost.



**NOTE:** Template Maker may automatically adjust the Use CG Text setting based on the operations specified in other dialog boxes.

- **Run Script on Change** – If set to True, execute script functions whenever the text is dynamically updated.
- **Script Module** – Name of VBScript module containing the script function.
- **Script Function** – Name of VBScript function to execute when Run Script on Change is set to True.
- **Run Action on Change** – If set to True, execute action whenever the text is dynamically updated.
- **Define Actions button** – Opens the Action Editor dialog box to create actions associated with dynamic text.
- **Set Format String** – Opens the Format String dialog to automatically format or replace characters in the text box whenever the text is dynamically updated.

## Working with Images

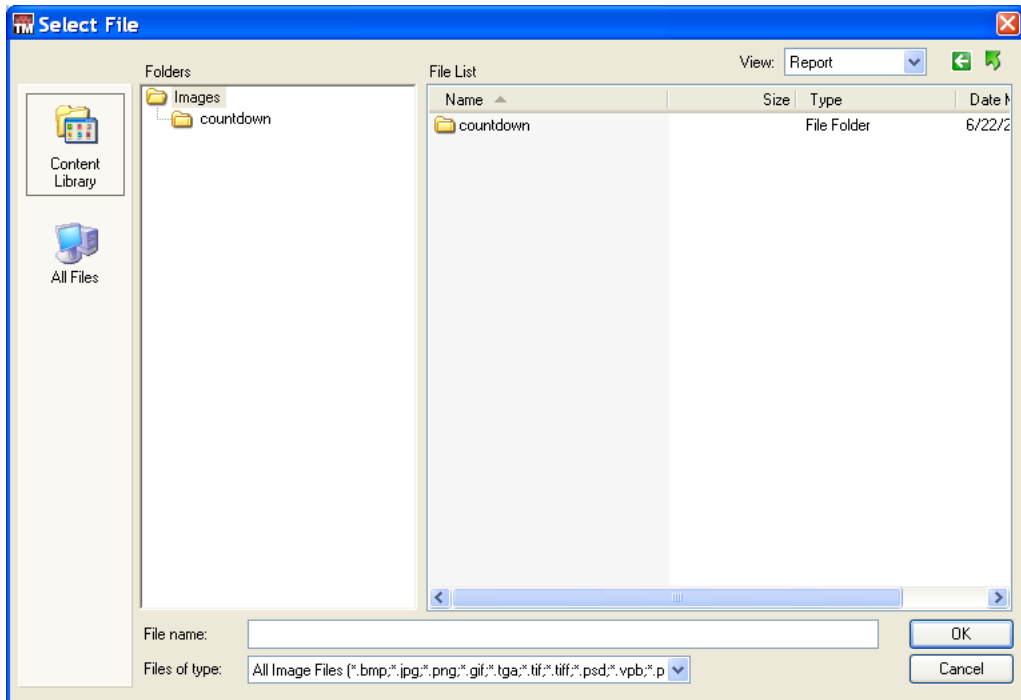
### Inserting Images

Polycom Template Maker supports many image formats not importable into Microsoft PowerPoint alone. This includes many 32-bit image formats such as TGA, TIF, and Adobe Photoshop (.PSD) image files. These assets should be imported into PowerPoint using Template Maker menu options, and not using the PowerPoint menu options.

**To import an image directly onto a slide, do the following:**

- 1 Select the slide in PowerPoint.

- 2 On the Template Maker toolbar, click the **Insert Image** button.  
The **Select File** dialog box appears.



- 3 To import an image from the preconfigured Content Library, select the Content Library icon and browse to select an image and click **OK**.  
The selected image appears on the slide.
- 4 To import an image from another location on your system, select the **All Files** icon and browse to select an image and click **OK**. The selected image appears on the slide.

#### To insert an image via the Style Browser:

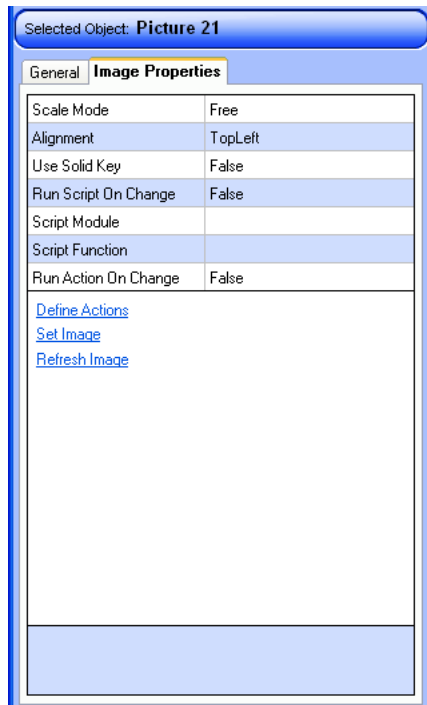
- 1 Select **Images** from the Type drop-down menu.
- 2 Browse for images via the dialog below.

When the image you wish to add appears in the Style Browser, right-click and select **Insert Image**.



## Modifying Image Properties

The Image Properties tab reveals options associated specifically with an image, and are defined as follows:



- **Use Key** — If set to true, uses an external key as an alpha mask, defining which areas of the image are transparent, and which areas are not.
- **Run Script on Change** — If set to True, execute script functions whenever the image is dynamically updated.
- **Script Module** — Name of VBScript module containing the script function.
- **Script Function** — Name of VBScript function to execute when Run Script on Change is set to True.
- **Run Action on Change** — If set to True, execute action whenever the image is dynamically updated.
- **Define Actions button** — Opens the Action Editor dialog box to create actions associated with dynamic images.
- **Set Image** — Replaces the currently selected image with another image.

## Working with Media

### Inserting Media

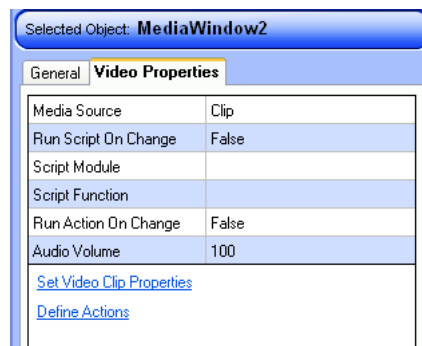
Polycom Template Maker provides the ability to import various forms of media as assets to be used in your digital signage application including video clips, live video feeds, live internet video streams, and even complete web pages.

To import media directly onto a slide, do the following:

- 1 Select the slide in PowerPoint.
- 2 On the Template Maker toolbar, click the Insert Media button.
- 3 A video color bar placeholder graphic appears on the slide.

### Modifying Media Properties

The Video Properties tab reveals options associated specifically with a media file, and are defined as follows:



- **Media Source** — Selects the video source type. Options available are Clip, Video In, Video Stream, Web Page. This choice affects the configuration availabilities.
- **Set Video Clip Properties** — Opens the Video Properties dialog box to define the source of the media clip and set additional properties. See the following section for more information.
- **Define Actions button** — Opens the Action Editor dialog box to create actions associated with dynamic clips.

### Source-Specific Configuration

- **Clip:**
  - **Run Script on Change** — If set to True, execute script functions whenever the clip is dynamically updated.

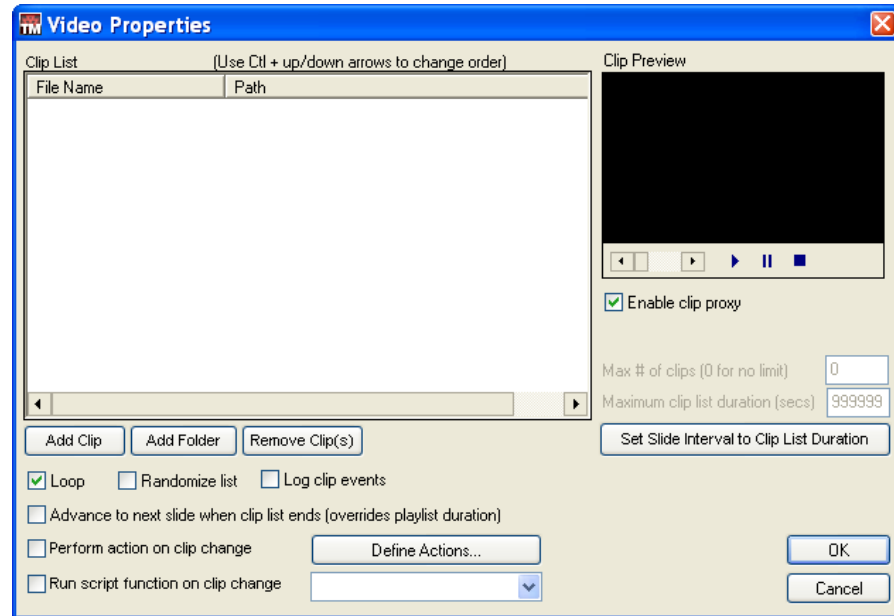
- **Script Module** – Name of VBScript module containing the script function.
- **Script Function** – Name of VBScript function to execute when Run Script on Change is set to True.
- **Run Action on Change** – If set to True, execute action whenever the clip is dynamically updated.
- **Video In:**
  - **Capture Source Index** – Select the index of the video/audio capture device from the drop-down menu.
  - **Audio Volume** – Select a volume from 1-100.
- **Video Stream:**
  - **URL** – Specify the source URL.
  - **Audio Volume** – Select a volume from 1-100.
- **Web Page:**
  - **URL** – Specify the source URL.
- **Clone:**
  - **Source Object** – Select the video clip to clone from the drop-down menu.
  - **Audio Volume** – Select a volume from 1-100.

## The Video Properties Dialog

**To access the video properties of a media clip, do the following:**

- 1** Select a media clip placeholder on a slide in PowerPoint.
- 2** In Template Maker, select the Video Properties tab.
- 3** Set the Media Source of the media clip to **Clip**.
- 4** From the Video Properties tab, choose **Set Video Clip Properties**.

The Video Properties dialog box appears.



Features available in the Video Properties dialog box are defined as follows:

- **Clip List** – Lists video clip or clips associated with the media asset placeholder. Template Maker lets you create video clip playback lists by adding more than one asset in the Clip List. Once more than one asset has been added to the Clip List, the order of the clips is modified by selecting an asset and pressing CTRL + up, to move an asset higher in the list, or CTRL + down to move an asset lower in the list.
- **Clip Preview window** – Shows a preview of the video selected in the Clip List.
- **Enable clip proxy** – When selected, replaces the color bar placeholder image for the media asset with the current frame shown in the Clip Preview window.
- **Add Clip button** – Selects a video source file from disk. To import a video directly onto a slide, do the following:
  - a Select the **Add Clip** button. The Select File dialog box appears.
  - b To import a video clip from the Content Library, select the Content Library icon and browse to choose a video clip and click **OK**.  
The selected video clip appears in the Clip List.
  - c To import a video clip from another location on your system, select the All Files icon and browse to choose a video clip and click **OK**.  
The selected video clip appears in the Clip List.
- **Add Folder button** – Selects a video source folder from disk.

- **Remove Clip(s)** button – Removes selected video clip(s) from the Clip List.
- **Loop** – When enabled, loops the playback of all video clips listed in the Clip List.
- **Randomize list** – When enabled, randomizes the playback of video clips list in the Clip List.
- **Log clip events** – When enabled, creates a log file related to the playback of video clips in the Clip List. By default, logs are stored on the system.
- **Advance to next slide when clip list ends (overrides playlist duration)** – When enabled, adjusts the overall duration of the template currently playing such that the total duration of all clips in the clip list has precedence.
- **Perform action on clip change** – When enabled, execute action whenever the clip is dynamically updated.
- **Define Actions** button – Opens the Action Editor dialog box to create actions associated with dynamic images.
- **Run Script on clip change** – If set to True, executes script function appearing in the adjacent drop-down list.

## Working with Flipbooks

A flipbook—also known as a cel animation—is a set of sequential images that create the illusion of movement when played out in rapid succession. Supported file types are the same as for images. Flipbook animation sequences may be keyed over a live video input or clip and are typically used to display animated company logos.

### Inserting Flipbooks

To import an image directly onto a slide, do the following:

- 1 Select the slide in PowerPoint.
- 2 On the Template Maker toolbar, click the **Insert Flipbook** button.  
The **Select File** dialog box appears.
- 3 To import a flipbook from the Content Library, select the Content Library icon and browse to select the first image from a flipbook series and click **OK**.
- 4 The selected flipbook appears on the slide.
- 5 To import a flipbook from another location on your system, select the All Files icon and browse to select the first image from a flipbook series and click **OK**.

The selected flipbook appears on the slide.

## Modifying Flipbook Properties

The Flipbook Properties tab reveals options associated specifically with a flipbook, and are defined as follows:

- **Filename** – The file path and first filename of the flipbook sequence. The source of the flipbook can be modified by clicking on the filename path, selecting the browse (...) button, and choosing a new source filename.
- **Preview** – Shows a thumbnail preview of the flipbook. Click the image to show flipbook playback controls in order to preview the flipbook.
- **Loop** – If set to true, the flipbook will loop continuously on the output.
- **Loopback Frame** – Frame to start from after every loop. This option is useful for when a flipbook sequence contains an introduction portion that need not repeat after successive loops of the animation.
- **Frame Rate** – Flipbook frame rate (in frames per second). This option is useful to control the overall timing of the flipbook, for example, if the sequence was rendered at a frame rate different from the desired playback frame rate.
- **Proxy Frame** – Sets the proxy thumbnail in the PowerPoint slide to be the frame specified, when choosing Set Proxy Image.

## Adding and Editing a Crawl

With Polycom Template Maker, creating a crawl is quick and simple. Crawls can be global – each slide in the presentation can display a crawl without having to create a new crawl for each slide. Crawls can also be local – so that each slide has its own specific crawl.

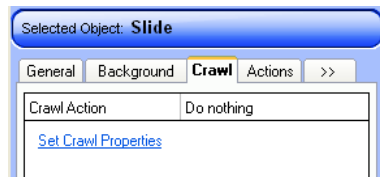
Crawl data can be entered manually by the operator during playout or the data can be fed automatically from any external, live data feed, a text file, or a database file. Crawls are available as slide properties. Crawls are also interchangeably referred to as crawling tickers.

### Basic Crawl Configuration

To modify the properties of a crawl, do the following:

- 1 Select a slide in PowerPoint.
- 2 In Template Maker, click the **Slide** indicator in the Current Slide area.

- 3 In the Selected Object area, select the **Crawl** tab. The slide crawl properties appear.



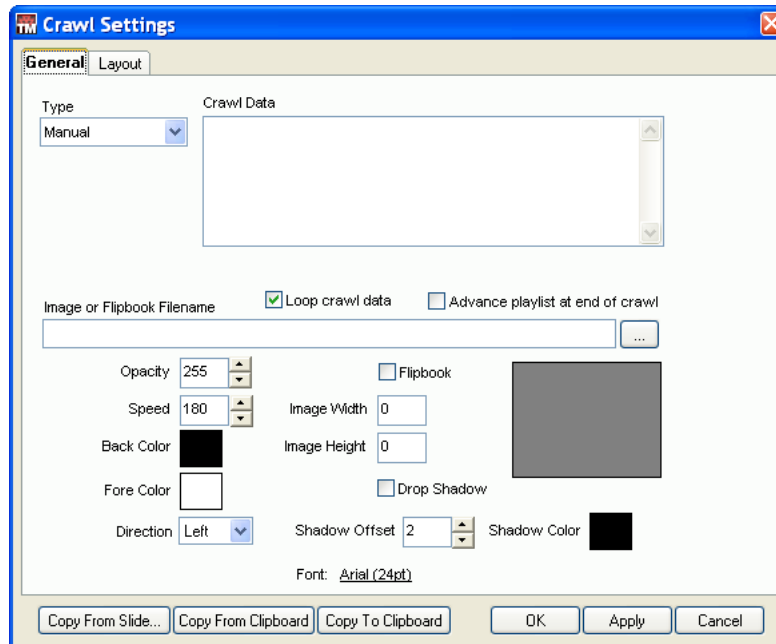
Select a crawl action from the drop-down menu.

- » **Do Nothing** – Does not affect the state of the crawl. If a crawl is currently playing, it continues to play when the current slide is loaded.
  - » **Stop crawl** – Stops the current crawl immediately when the current slide is loaded.
  - » **Start with default settings** – Starts the crawl with default parameter settings.
  - » **Start with custom settings** – Starts the crawl with custom parameter settings.
- 4 Click the **Set Crawl Properties** button to open the Crawl Settings dialog box in order to create a custom crawling ticker.

### Creating a Manual Crawl

- 1 In the Selected Object area, select the **Crawl** tab.
- 2 Set the Crawl Action to **Start with custom settings**.
- 3 Click the **Set Crawl Properties** button.
- 4 The **Crawl Settings** dialog box opens.

## 5 Set the crawl Type to **Manual**.



- 6 Enter text into the **Crawl Data** text area, entering a line break in between each line of crawl data.
- 7 Click **Apply** to instantly preview the crawl on the screen.

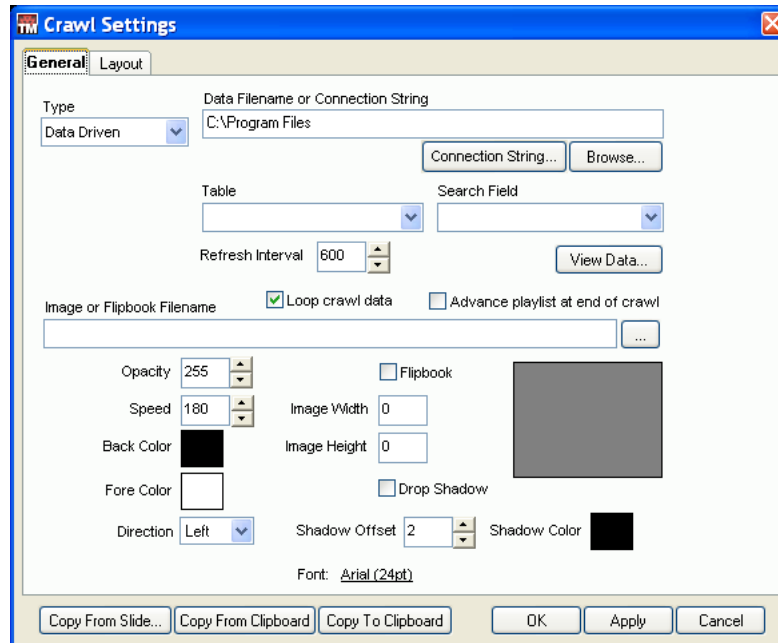
## Creating a Data-Driven Crawl

To modify the properties of a crawl, do the following:

- 1 Select a slide in PowerPoint.
- 2 In the Selected Object area, select the **Crawl** tab.
- 3 Set the Crawl Action to **Start with custom settings**.
- 4 Click the **Set Crawl Properties** button.
- 5 The Crawl Settings dialog box will open.



## 6 Set the crawl Type to **Data Driven**.



7 In the Data Filename field, click **Browse** to select an Access database or text file.

8 Click **Apply** to instantly preview the crawl on the screen.

## Crawl Properties

Crawl properties apply equally for data-driven and manual crawls. The crawl properties associated with a slide are defined as follows:

- **Type** – Specifies the type of crawling ticker. Options available are either Manual or Data Driven.
- **Loop crawl data** – When checked, repeatedly loops the crawl data present in a manual or data driven crawl. When unchecked, crawl data appears once on-screen and then crawl playback stops.
- **Advance playlist at end of crawl** – When checked, advanced the playlist following the end of crawl data items.
- **Image or Flipbook Filename** – Specifies the path to an image or flipbook to use as a graphical separator in between lines of crawl data.

To add an image or flipbook graphic separator into the crawl, do the following:

- In the Image or Flipbook Filename field, click Browse.
- Select an image or a flipbook image and click Open.
- If adding a flipbook, check the Flipbook option.

**d** Set the width and height in the Image Width and Image Height fields and click Apply.

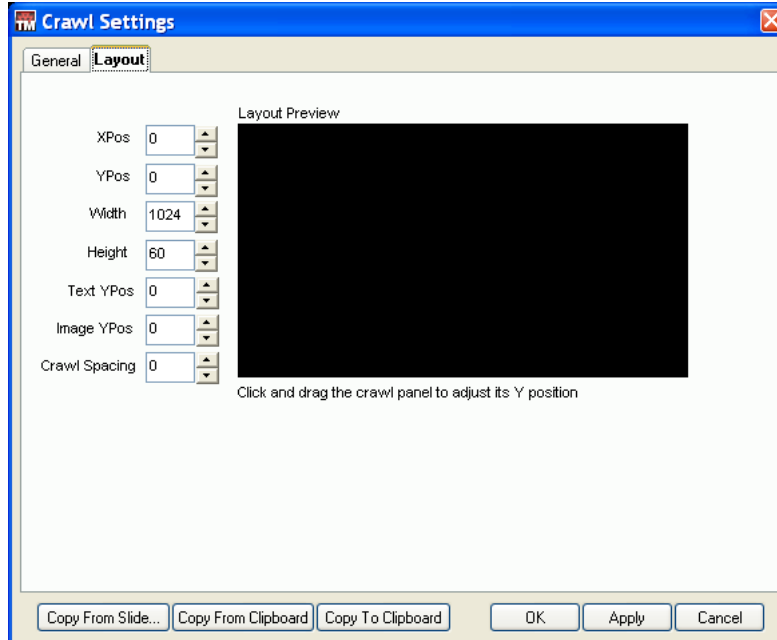
- **Opacity** – Specifies the degree of transparency to the background crawl bar.
- **Speed** – Specifies the speed at which the crawl moves in the direction specified by Direction.
- **Back Color** – Specifies the color to the background crawl bar.
- **Fore Color** – Specifies the color of the crawl text.
- **Drop Shadow** – When checked, adds a drop shadow to the crawling text.
- **Shadow Offset** – Specifies the distance from the crawling text at which a drop shadow is drawn.
- **Shadow Color** – Specifies the color of the drop shadow.
- **Direction** – Specifies the motion of the crawl across the screen. The following options are available:

Option	Description
Left	Moves the crawl from the right side of the screen to the left. This is the default.
Right	Moves the crawl from the left side of the screen to the right.
Up	Moves the crawl from the bottom of the screen up to the top.
Down	Moves the crawl from the top of the screen down to the bottom.

- **Font** – Specifies which system font to use for the crawl text.
- **Copy From Slide** button – Lets you copy the crawl settings configured in another slide.
- **Copy From Clipboard** button – Lets you apply the crawl settings to the Crawl Settings when a crawl has been copied to the clipboard.
- **Copy To Clipboard** button – Copies the Crawl Settings of the current crawl to the clipboard.

## Setting the Position of a Crawl

Open the **Layout** tab of the Crawl Settings dialog to set the crawl position within the template.



- **XPos** – Specifies the horizontal begin point of the crawl (in pixels).
- **YPos** – Specifies the vertical position of the crawl (in pixels).
- **Width** – Specifies the horizontal extent of the crawl across the screen (in pixels).
- **Height** – Specifies the vertical extent of the crawl across the screen (in pixels).
- **Text YPos** – Specifies the vertical positioning of the crawl text within the crawl bar (in pixels).
- **Image YPos** – Specifies the vertical positioning of the separator image within the crawl bar (in pixels).
- **Crawl Spacing** – Specifies the distance between lines of crawl data (in pixels).

# Adding Clocks and Tickers

## Adding a Clock

Using Template Maker, text boxes can be configured to receive dynamic text, such as a running clock or date field, as opposed to simple text that is entered at design time into the text box itself. You can display a clock on a slide and keep it on for the entire production. The clock's time is updated as its content is replaced on a continuous basis.

### To specify the date or time in a text box:

- 1 In PowerPoint, create a text box object and select it.
- 2 In the General tab of Template Maker, enter a descriptive name for the text box in the **Display Name** field.
- 3 In the Current Slide area, click **Slide**. The available slide properties appear.
- 4 Click the Next (>>) tab to reveal more slide properties and choose Clocks and Tickers. The TickerList area appears.
- 5 In the Clocks and Tickers tab, choose **Add**. The Ticker Properties dialog box appears.
- 6 In the General area of the Ticker Properties dialog box, enter a name to describe the ticker.

**7** In the Type drop-down list, select **Clock**.

**Ticker Properties**

General

Name: Ticker1      Type: Clock       Render output on change

Clock Settings

Type: Standard      Format: h:mm

Prepend Text:      Append Text:

Offset: H: 0      M: 0      S: 0

Precision: 0       Stop at zero  
 Show minus sign

Countdown To Time: 6/25/2010 8:55:10 PM      Countdown From Number: 0

Field	Target Object
Time	

Run script on change       Perform action on change

Script Function:      Define Actions...      OK      Cancel

- 8** Enable the **Render output on change** field, which automatically updates the ticker on the output when the object changes values.
- 9** In the Clock Settings area of the Ticker Properties dialog box, select a clock type from **Type** drop-down list. Available clock types are: Standard, Time Countdown, Second Countdown.
- 10** Choose a time display configuration from the **Format** drop-down list.
- 11** Enter text to precede the clock or to follow the clock by entering characters in the **Prepend Text** and **Append Text** fields.
- 12** The clock can be offset by a time specified through adjusting the H (Hour) /M (Minute) /S (Second) parameters.
- 13** Enter a decimal point precision for the clock by choosing an integer from the **Precision** parameter.
- 14** Enable **Stop at zero** to stop the clock at the zero marker (when clock type is set to Time Countdown).
- 15** Enter a time value to countdown to in the Countdown To Time field; e.g.: "5/30/2007 10:00:00 AM" (when clock type is set to Time Countdown).
- 16** To target the text box created in step 6 above with the clock object, select the text box named "Time" in the Target Object drop-down list.
- 17** Click **OK** to close the Ticker Properties dialog box.
- 18** The name of the ticker created appears in the TickerList.
- 19** To add another ticker, in the Clocks and Tickers tab choose **Add**.

- 20** To delete a ticker, select the ticker in the Clocks and Tickers tab and choose **Remove**.
- 21** To copy a ticker from one slide to another, select the ticker in the Clocks and Tickers tab and choose **Copy**.
- 22** To paste a ticker that's been previously copied, from the Clocks and Tickers tab choose **Paste**.
- 23** To make changes to a ticker, select the ticker in the Clocks and Tickers tab and choose **Edit**.

Additional ticker options are described as follows:

- **Run script on change** – If set to True, execute script functions whenever the text is dynamically updated.
- **Script Function** – Name of VBScript function to execute when Run Script on Change is set to True.
- **Perform action on change** – If set to True, execute action whenever the text is dynamically updated.
- **Define Actions** button – Opens the Action Editor dialog box to create actions associated with dynamic text.

## Adding a Ticker

Template Maker lets you display data from various sources including Microsoft Excel spreadsheets, Access database files, as well as XML files. You can link a text box object to a single data element that appears when the slide is played out. Alternatively, the template can display several data items that are each on air for a specified period of time before being replaced by the next item.

### To specify the date or time in a text box:

- 1** In PowerPoint, create a text box object and select it.
- 2** In the General tab of Template Maker, enter a descriptive name for the text box in the **Display Name** field.
- 3** In the Current Slide area, click **Slide**. The available slide properties appear.
- 4** Click the Next (>>) tab to reveal more slide properties and choose **Clocks and Tickers**. The TickerList area appears.
- 5** In the Clocks and Tickers tab, choose **Add**. The Ticker Properties dialog box appears.
- 6** In the General area of the Ticker Properties dialog box, enter a name to describe the ticker.

**7** In the Type drop-down list, select **Ticker**.

**8** Enable the **Render output on change** field, which automatically updates the ticker on the output when the object changes values.

In the Data Source area of the Ticker Properties dialog box, click the **Browse...** button to link to a database filename.

**9** To begin retrieving data from the first row of the database, enter 1 in the **Starting Row** field.

**10** To display one or more records at a time, adjust the parameter in the **Return X records(s) at a time** field.

**11** To continuously display or to wrap the records contained in a database, enable the **Loop records** and **Wrap records** options.

The Text Search options are described as follows:

- **Table/Worksheet** box – Select the database table that contains the data you want to display. Click View to view the entire data file.
- **Search Field** box – Select a field based on the table selection.
- **Search Text** field – Specify a string for which to search.
- **View** button – Lets you view the data contained in the selected data.
- **Allow partial matches** – Enable to allow for the string to be matched by the first few characters and to find matching strings more quickly.
- **Sort results** – Sorts the contents and output order of the table based on the field specified by Sort Field.

- **Sort Field** box – Select a field in which to sort the contents of the table when Sort results is enabled.

The SQL options are described as follows:

- **SQL String** field – Specify an SQL query to extract data from the database file. For details on creating SQL queries, see [www.microsoft.com](http://www.microsoft.com).
- **View Data** button – Lets you see the data retrieved from the entered SQL query.
- **Refresh Field List** – Refreshes the display of available fields.

The Specify Row/Col options are described as follows:

- **Table/Worksheet** box – Select the worksheet from which to select data. Click View to view the data in the selected worksheet.
- **Row and Column** boxes – Specifies the spreadsheet column and row location of the cell for which you want to display data for the selected worksheet. Click Select the view the spreadsheet details and select the cell.

- 1 To target the text box created above with the clock object, select the text box named “CityText” in the Target Object drop-down list.
- 2 Repeat step 11 for all database fields you wish to assign to other target objects.
- 3 Click OK to close the Ticker Properties dialog box.

The name of the ticker created appears in the TickerList.

- 4 To add another ticker, in the Clocks and Tickers tab choose Add.
- 5 To delete a ticker, select the ticker in the Clocks and Tickers tab and choose Remove.
- 6 To copy a ticker from one slide to another, select the ticker in the Clocks and Tickers tab and choose Copy.
- 7 To paste a ticker that’s been previously copied, from the Clocks and Tickers tab choose Paste.
- 8 To make changes to a ticker, select the ticker in the Clocks and Tickers tab and choose Edit.

Other options available in the Ticker Properties dialog box specific to Tickers are described as follows:

- **Ticker Interval (sec)** – Time between when text objects are refreshed with new data from the database (in seconds).



- **Auto start on load** – Begins displaying items in the database immediately after the slide is rendered to the screen.
- **Advance to next slide after last record** – Proceed to the next slide in the playlist after all records from the database have been displayed.
- **Copy data file to prevent locking** – Some database files, such as Microsoft Excel spreadsheets, may produce errors when simultaneously reading and/or writing to them from external applications. To let Template Maker create a local copy of the database file for use with tickers and to prevent file locking, enable this option.

Additional ticker options are described as follows:

- **Run script on change** – If set to True, execute script functions whenever the text is dynamically updated.
- **Script Function** – Name of VBScript function to execute when Run Script on Change is set to True.
- **Perform action on change** – If set to True, execute action whenever the text is dynamically updated.
- **Define Actions** button – Opens the Action Editor dialog box to create actions associated with dynamic text.

## Working with Objects

### Inserting Objects on a Slide

When designing your slides, you can insert object styles on your slides. You can use any of these objects as a baseline and then modify color, contrast, and other properties to suit the design of your presentation.

#### To apply an object style to a PowerPoint object:

- 1 In the Style Browser, choose **Objects** from the Type box.
- 2 From the Category box, choose the category of objects that best suit the design of the slide.
- 3 In the Style Browser, select an object and right-click.
- 4 From the menu, choose **Insert Object**.

The object is inserted on the slide. You can also click-and-drag the object into place on the PowerPoint slide. As you drag, a graphical representation appears representing the object, and the object's proportions relative to the slide.

## Working with Object Groups

Individual slide elements can be grouped together and treated as a single object. When you use the Group command to group objects, you combine them so you can work with them as though they were a single object. You can flip, rotate, and resize or scale all objects in a group as a single unit.

You can ungroup a group of objects at any time and then regroup them later.

### To group elements into an object, do the following:

- 1 Select one or more slide elements in a slide.
- 2 Right-click on any of the elements, and from the right-click menu that appears choose **Grouping > Group**.

### To ungroup object into individual elements, do the following:

- 1 Select an object group.
- 2 Right-click on the group, and from the right-click menu that appears choose **Grouping > Ungroup**.

# Working with Animations

## Animating Objects on a Slide

Animation presets simplify the use of animations for introducing, looping, and closing objects that appear in a template.

While a slide is playing out, objects on the slide can also have in animation and out animation effects when they appear and are removed from view.

To create animation for individual slide objects:

- 1 Select an object on a slide.
- 2 In the Template Maker region, choose an Animation Type from the In Animation palette.
- 3 If desired, choose an Animation Type from the Out Animation palette.
- 4 For both In and Out animations, you can modify animation properties. In Animation and Out Animation panels have the same properties except the Out Animation panel does not have the option 'Auto play on slide load.'

Modify animation properties as follows:

- **Animation Type** – Select from a list of predefined animation effects. See “About Template Maker Animations” for a description of each animation.
- **Preview button** – Previews the selected animation effect in the CG Renderer.
- **Offset box** – Specifies the offset or delay at which to execute the animation. Use this value in conjunction with other objects to interplay animation effects among objects so that one object’s animation occurs at a different time than another object’s animation.
- **Duration field** – Specifies the length of time, in seconds, that the animation effect takes to perform.
- **Auto play on slide load** – When enabled, starts the animation effect automatically as you move to the next slide in the presentation. This option is only available for In animations.

## Types of Animations

The animations that can be applied via Template Maker include:

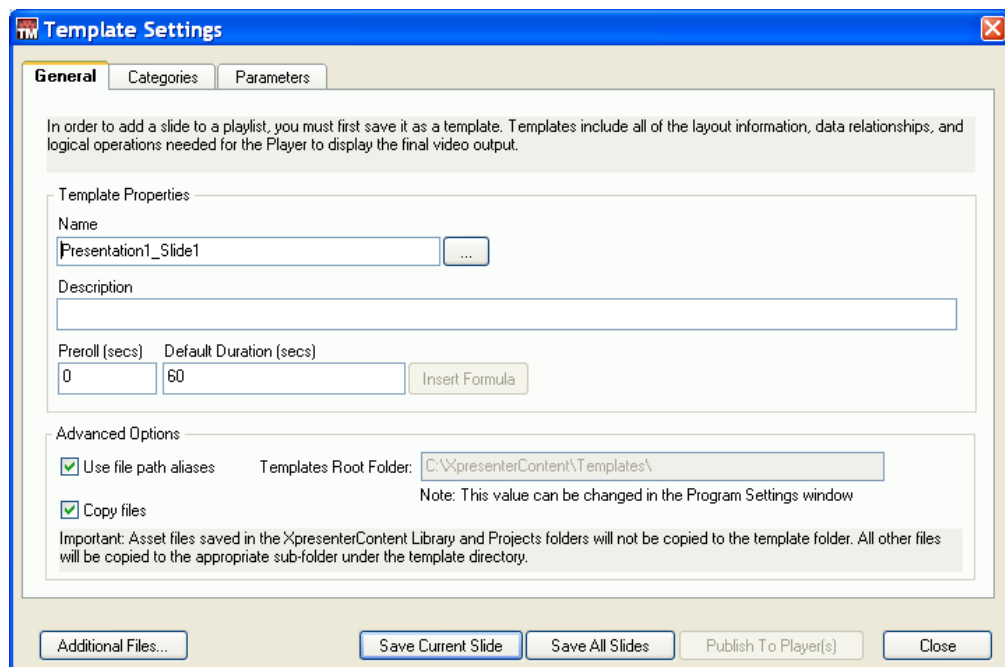
- **Fly from Left:** the object will appear to move from off-screen on the left side of the slide, and travel to the right.
- **Fly from Left + Fade:** the object will fade in while appearing to move from off-screen on the left side of the slide, and travel to the right.
- **Fly from Right:** the object will appear to move from off-screen on the right side of the screen, and travel to the left.
- **Fly from Right + Fade:** the object will fade in while appearing to move from off-screen on the right side of the slide, and travel to the left.
- **Fly from Top:** the object will appear to move from off-screen above the slide, and travel downwards.
- **Fly from Top + Fade:** the object will fade in while appearing to move from off-screen above the slide, and travel downwards.
- **Fly from Bottom:** the object will appear to move from off-screen below the slide, and travel upwards.
- **Fly from Bottom + Fade:** the object will fade in while appearing to move from off-screen below the slide, and travel upwards.
- **Fade On:** the object will fade into view.
- **Scale X:** the object will appear compressed, and will stretch out along the horizontal axis of the slide, like an accordion.
- **Scale X + Fade:** the object will fade into view while appearing compressed, and will stretch out along the horizontal axis of the slide as it fades fully into view.

- **Scale Y:** the object will appear compressed, and will stretch out along the vertical axis of the slide, as though it is “growing” up from the bottom of the slide.
- **Scale Y + Fade:** the object will fade into view appearing compressed, and will stretch out along the vertical axis of the slide, as though it is “growing” up from the bottom of the slide.
- **Scale X + Scale Y:** the object will appear to grow out of a single point in the distance and zoom into view.
- **Scale X + Scale Y + Fade:** the object will gradually fade into view while appear to grow out of a single point in the distance.

## Saving a Template

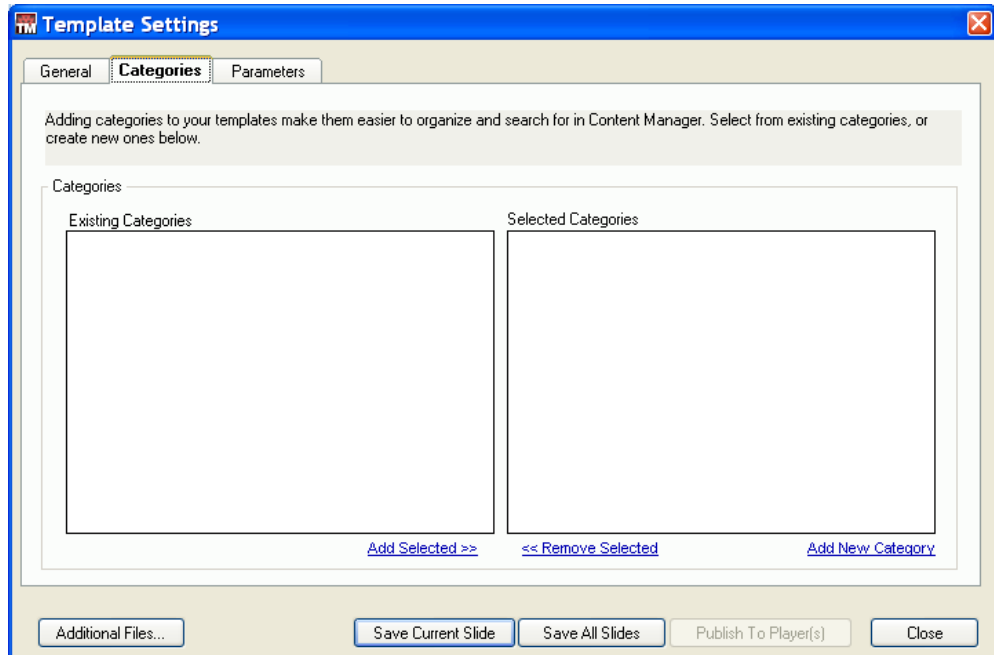
Once a slide has been designed in Microsoft PowerPoint, user must export the slide as a template.

- 1 In Polycom Template Maker, choose the Save Slide as Template button. Alternatively, navigate to **File > Save Slide as Template**.
- 2 The Template Settings dialog box appears.



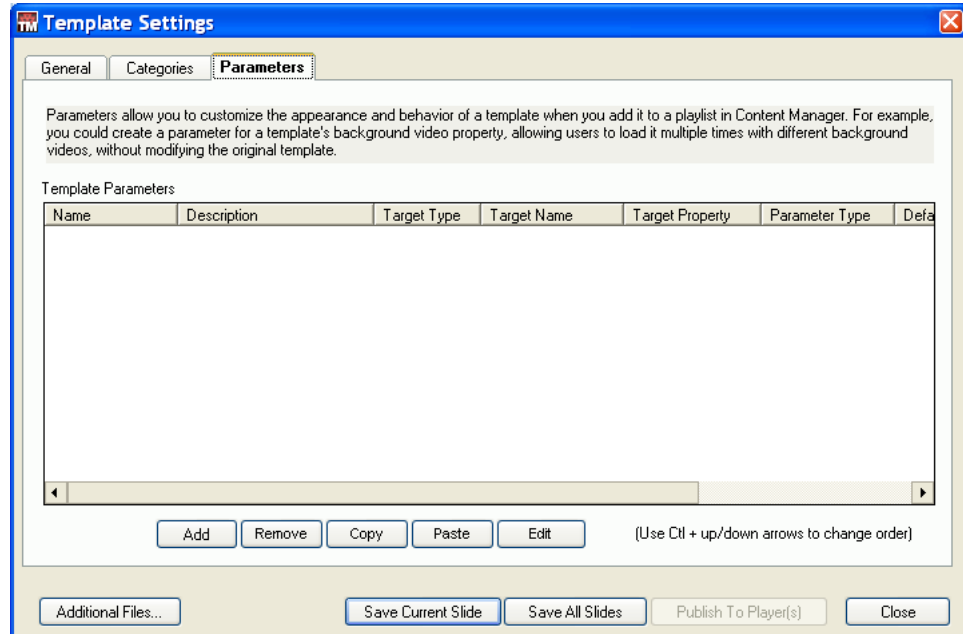
- 3 Enter a **Name** for the template to export.
- 4 In the Templates Root Folder, enter or browse to the local folder containing templates (typically C:\XpresenterContent\Templates).

- 5 To assign the template to one or more specific categories, in the Categories area, in the Existing Categories list box, browse to an available category and choose Add Selected.

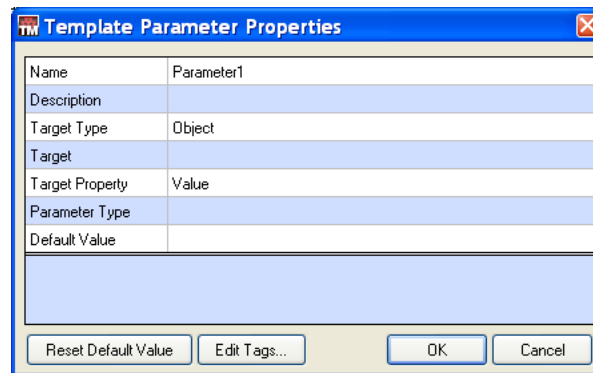


- 6 To assign the template to a new category, in the Selected Categories area, choose **Add New Category**.
- 7 In the **Add Category** dialog box, enter the name of a new category and choose OK.
- 8 The new category name appears in the Selected Categories list.
- 9 To remove the template from a category, select a category from the Selected Categories list and choose **Remove Selected**.

- 10 In the Template Parameters area, to add a variable parameter to the object that can be modified when the template is added to a playlist in the Web Controller, choose Add.



- 11 The Template Parameter Properties dialog box appears.



The options available in the Template Parameter Properties dialog box are described as follows:

- **Name** – Specifies the name of the variable parameter.
- **Description** – Specifies a description of the variable parameter.
- **Target Type** – Specifies whether the parameter is an Object, Slide, Variable, or Data Ticker.
- **Target** – Depending on the Target Type, specifies what is targeted.

- **Target Property** – Depending on the Target Type, specifies what property of the parameter is targeted. For example, when Target Type is Object, and Target is a text box, Target Property fields available are Text, Font, Color. When Target Type is Object, and Target is an image, Target Property field available is Filename.
  - **Parameter Type** – Specifies the parameter type. Available options are Text, Image, Video, Audio, Filename, File List, Data Source, Color, Font, Boolean.
  - **Default Value** – Specifies what placeholder text or link to file appears by default when initially inserting the object into the slide.
- 12** Click **OK** to close the Template Parameter Properties dialog box.
  - 13** In the Template Settings dialog box, to remove a parameter, select one in the Object Parameters list and choose **Remove**.
  - 14** To copy a parameter, select one in the Template Parameters list and choose **Copy**.
  - 15** To paste a copied parameter, choose **Paste**.
  - 16** To make changes to a parameter, select one in the Template Parameters list and choose **Edit**.
  - 17** In the Template Properties area, in the Description field, enter a description for the template to export.
  - 18** In the Preroll box, set the number of seconds.
  - 19** In the Slide Duration box, set the number of seconds the template is to remain on-screen.
  - 20** To include additional content associated with the template, choose **Additional Files...**
  - 21** To export the current slide as a template, choose **Export Current Slide**.
  - 22** To export multiple slides as multiple templates, choose **Export All Slides**.
  - 23** Click **Close** to close the Template Settings dialog box.





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# Using the Data Parser

This chapter explains the interface and use of the Polycom Digital Signage Data Parser.

This chapter contains the following sections:

- [About the PDS Data Parser](#)
- [Creating a Data Source](#)
- [Using a Data Source](#)

## About the PDS Data Parser

The Polycom Digital Signage Data Parser allows administrators to acquire, manage, and use live RSS feeds as a data source for the Polycom Digital Signage Player output. With the Data Parser, administrators can publish feeds from individual news outlets, topic-based searches, and specific geographies to any audience.

While this chapter outlines the RSS use case for the PDS Data Parser, the Data Parser can also ingest data from a wide variety of other sources. For information on other use cases, please consult [Appendix B: Data Parser](#) on page 171.

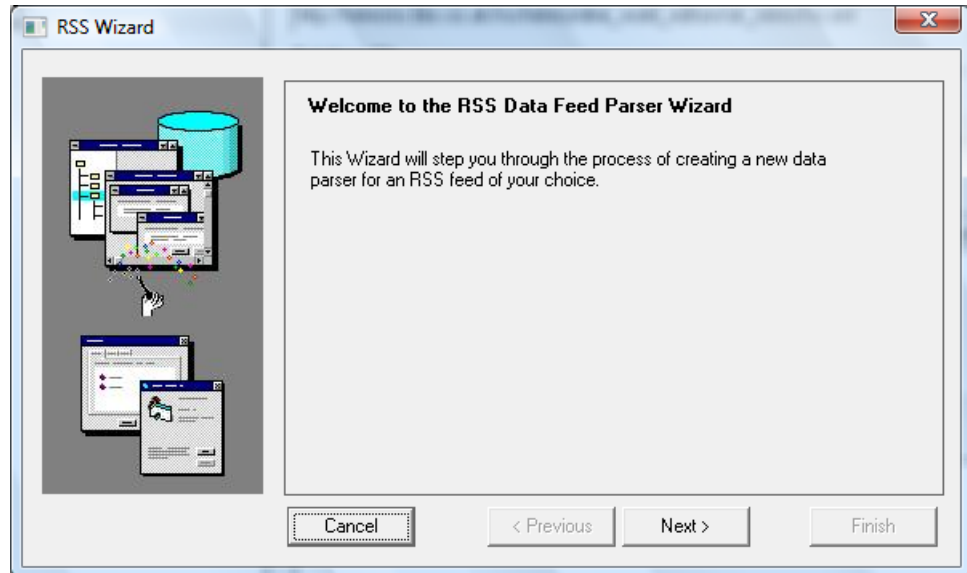
## Creating a Data Source

In order to use an external feed in the Polycom Digital Signage Player, a data source must be created in the PDS Data Parser.

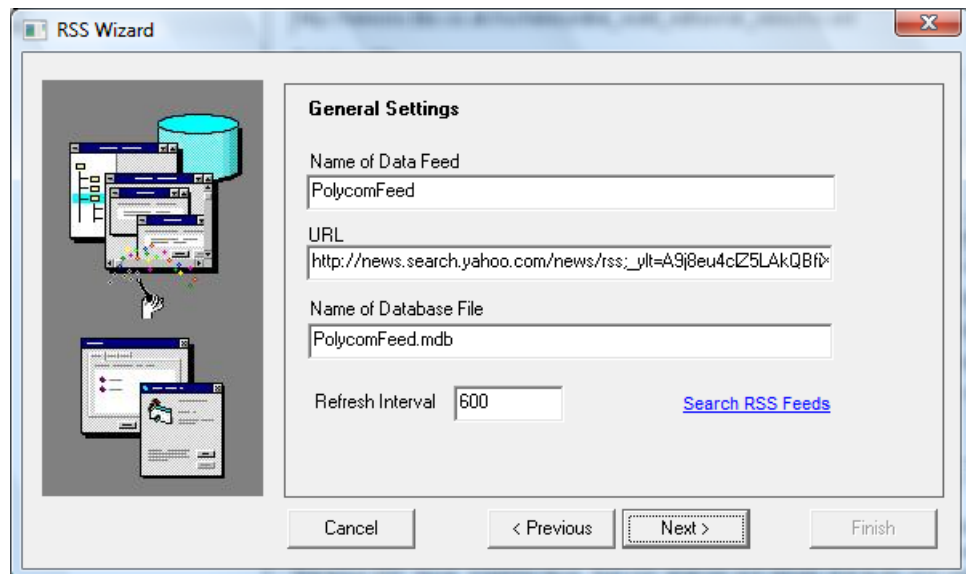
**To create a data source:**

- 1 Launch the Polycom Digital Signage Data Parser.
- 2 Open **Tools > RSS Wizard**.

**3** The RSS Wizard will appear. Click **Next**.



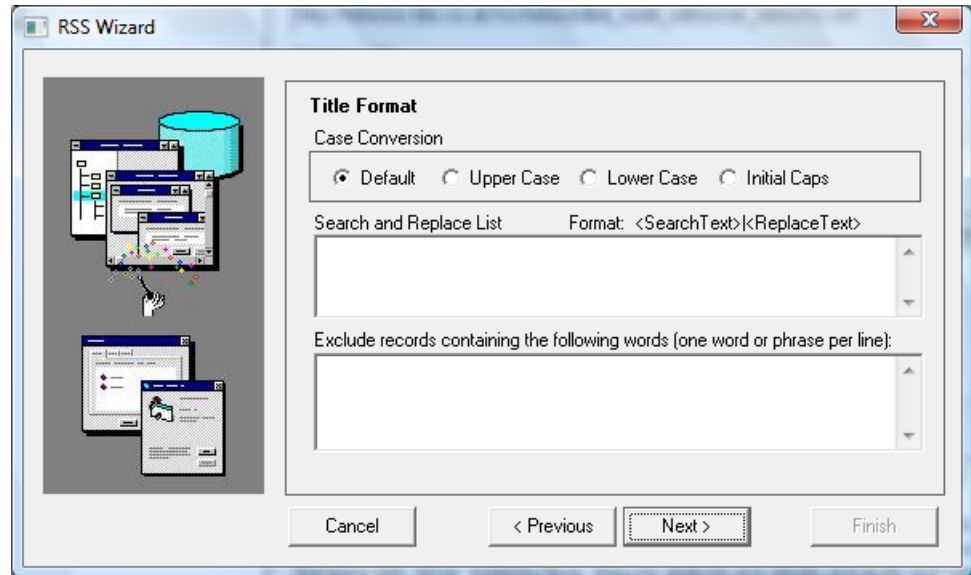
- 4** You will be prompted to designate a **Data Feed Name** and **Database File**, which should be changed from the default. These values must contain no spaces. You will also be prompted to enter the URL for your data source:
- a** Enter the URL of the feed. If you wish to browse for a feed, click **Search RSS Feeds**.
  - b** Your internet browser will launch. By default the Data Parser will take you to Yahoo! News RSS feeds.
  - c** Choose a feed from the list presented or enter a topic or keyword into the Search textbox. In the example below, we have set a filter for "Polycom" in Yahoo! News.



- 5 After designating a Data Feed name, URL, and Database File, enter the **Refresh Interval**. This value determines the time, in seconds, between live updates of the RSS feed.

Click **Next**.

- 6 The **Title Format** window will appear.



- a Choose a **Case Conversion** method, if necessary, to modify the capitalization of all text contained in the Title/Headline section of the feed.

- b Enter a series of **Search & Replace** character strings, if necessary, to strip out unwanted text, or to automatically add characters to the feed. The **Format** of the Search & Replace list is as follows:

[SearchText] | [ReplaceText]

For example, to automatically format incoming data, enter the following into the Search & Replace list:

```
<![CDATA[ |
]]> |
```

The Search & Replace will modify this string of text as follows:

*Unformatted raw data:*

```
<![CDATA[Polycom announces its Digital Signage
Solution]]>
```

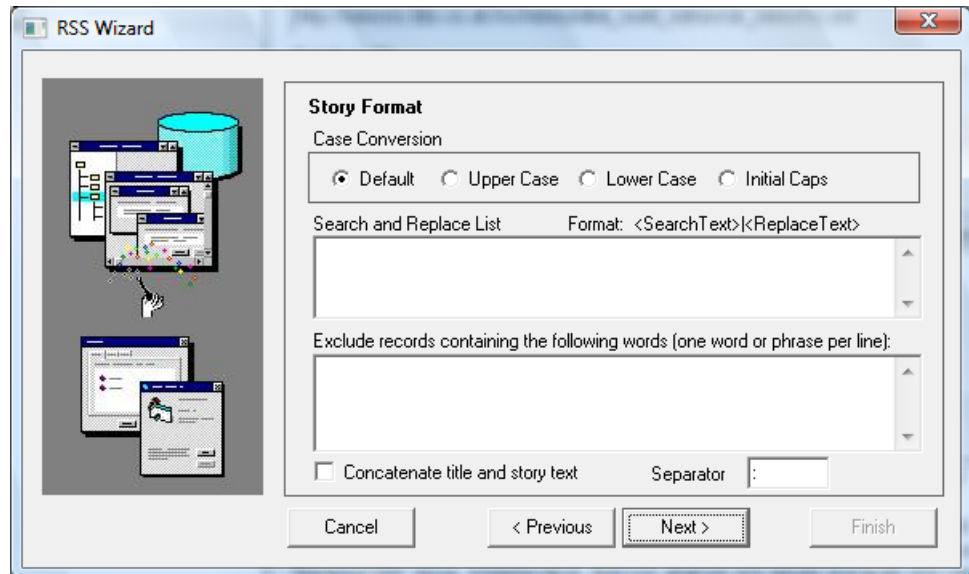
*Formatted data:*

```
Polycom announces its Digital Signage Solution
```

- c If you wish to exclude items with certain words or phrases in the title, indicate those words and phrases.

Click **Next**.

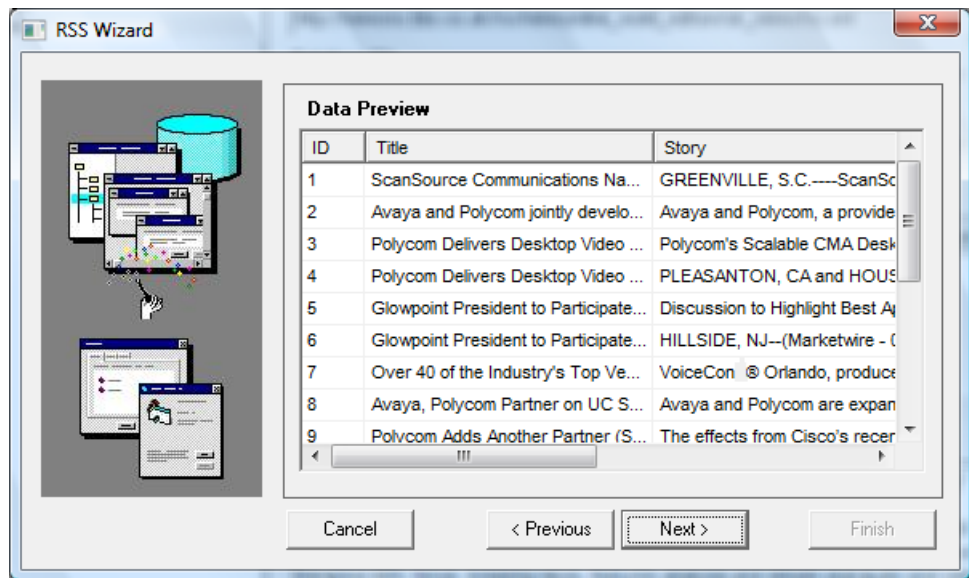
## 7 The **Story Format** window will appear.



- a Choose a **Case Conversion** method, if necessary, to modify the capitalization of all text contained in the Story section of the feed.
- b If necessary, enter **Search and Replace** formatting as described above.
- c If you wish to exclude items with certain words or phrases in the body, indicate those words and phrases.
- d Select **Concatenate title and story text** to merge Title data with the Story data, stored in the Story field of the database. To automatically place a character in between the concatenated title and story text, enter a character in the Separator text area.

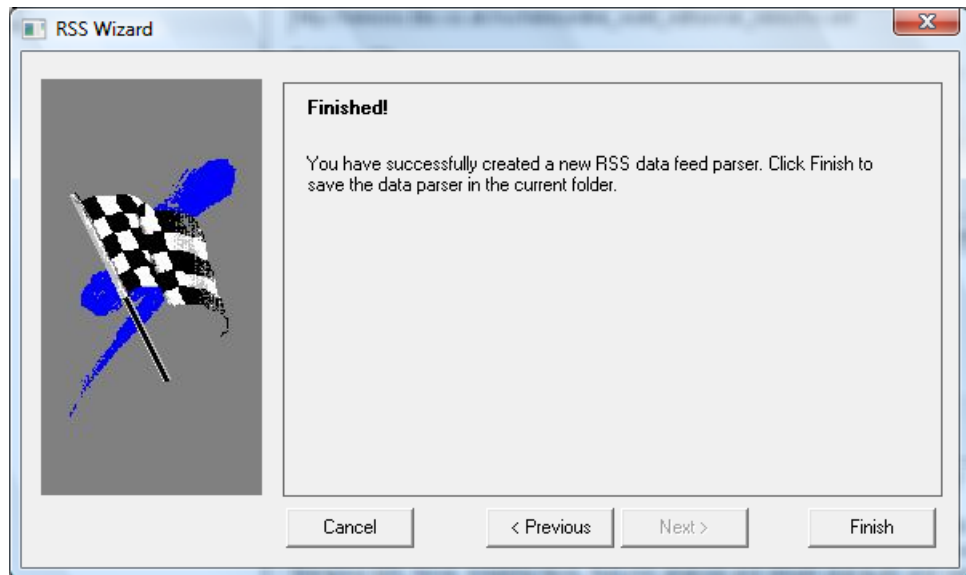
Click **Next**.

- Verify the formatting and content of the incoming data feed by examining the text in the **Data Preview** panel. Click **Next**.



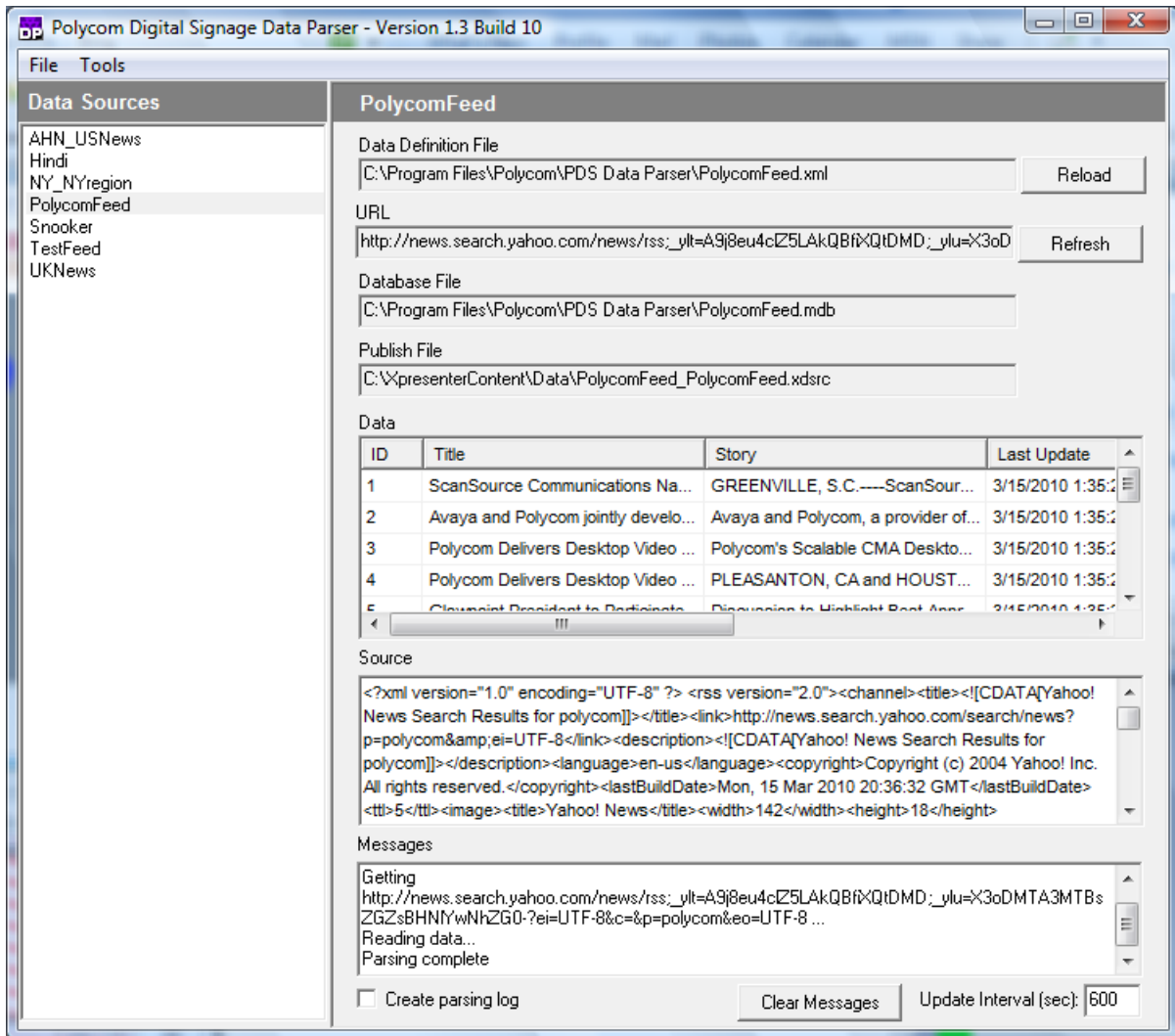
**NOTE:** Not all RSS feeds can be parsed and displayed correctly. Please confirm that titles and stories appear, and appear legibly, in the Data Preview panel.

- The completion screen will appear. Click **Finish**.



- 10 The feed created in the RSS Wizard will now appear as a Data Source in the Data Parser main menu. This means that a Data Definition .xml file and a .mdb Database File will now appear in the PDS Data Parser directory.

For all subsequent steps, however, you will need to use the .xsrc file located in C:\PolycomContent\Data.



## Licensing Data Parser

## Using a Data Source

After a Data Source is created, it can then be used to replace the sources in the Entertainment, Breaking, and Sports News default playlist templates or to create a new FSDData template. With the Remote Manager and Web Controller tools, administrators can distribute a data source created in any one Data Parser to all PDS Players in a network.



**NOTE:** All PDS Players must have Data Parser installed and running. To confirm that a Player has Data Parser installed, consult the **System Info** tab of the Network pane in Remote Manager. If the **Dataparser Version**, **Dataparser License**, and **DP ID** fields exist and are populated with data, the Data Parser should be installed on the target Player.

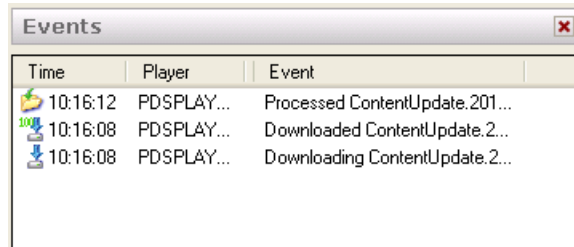
### To use a data source in a playlist in a remote PDS Player:

- 1 Open the Remote Manager.
- 2 If the data source has been created on a remote PDS Player, you will need to:
  - a Right-click on the PDS Player and open the Management Console.
  - b Open the **File Manager** tab of the Management Console.
  - c Navigate to **C:\PolycomContent\Data**. Locate the .xsrc file for the data source you created in the previous section.

Name	Size	Date
DataFeeds_TestFeed.xsrc	21,081	3/12/
dataparser1.png	76,534	3/15/
lib_Trivia.xls	30,720	1/8/2
NYR_TestFeed.mdb	745,472	3/15/
NYR_TestFeed.xsrc	204,555	3/15/
NY_NYRegion.mdb	352,256	3/12/
NY_NYRegion.xsrc	17,715	3/12/
PolycomFeed_PolycomFeed.mdb	208,896	3/16/
<b>PolycomFeed_PolycomFeed.xsrc</b>	4,994	3/16/
snooker_Snooker.mdb	270,336	3/15/
snooker_Snooker.xsrc	4,318	3/15/
Uknews_UKNews.mdb	618,496	3/16/
Uknews_UKNews.xsrc	9,157	3/16/
YahooFeeds_TestFeed123.mdb	376,832	3/12/
YahooFeeds_TestFeed123.xsrc	21,081	3/12/

- d Download the .xsrc file to the computer running Remote Manager.
  - e When the download has completed, close the Management Console and return to the Remote Manager main interface.
- 3 In the Remote Manager main interface, click **Publish Content**.

- 4 Add the .xdsrc file to the Content Update. Right-click on the file and select **Change Target Path**. Enter the target path **C:\PolycomContent\Data**.
- 5 Click **Next**. Designate the Content Update Properties and all Target Players that will need to display the content and click **OK**.
- 6 The Events area of the Remote Manager should show that the Content Update has been downloaded and processed.



The screenshot shows a window titled "Events" with a table containing three rows of event data. The first row shows a processed event at 10:16:12. The second and third rows show download events at 10:16:08, with the second row indicating the download is complete (100%) and the third row indicating it is in progress.

Time	Player	Event
10:16:12	PDSPLAY...	Processed ContentUpdate.201...
10:16:08	PDSPLAY...	Downloaded ContentUpdate.2...
10:16:08	PDSPLAY...	Downloading ContentUpdate.2...

- 7 Open the Web Controller.



## 8 Navigate to the **Playlist Editor** tab.

**Playlist Editor** DefaultPlaylist.xplst

Available Playlists:  
 DefaultPlaylist

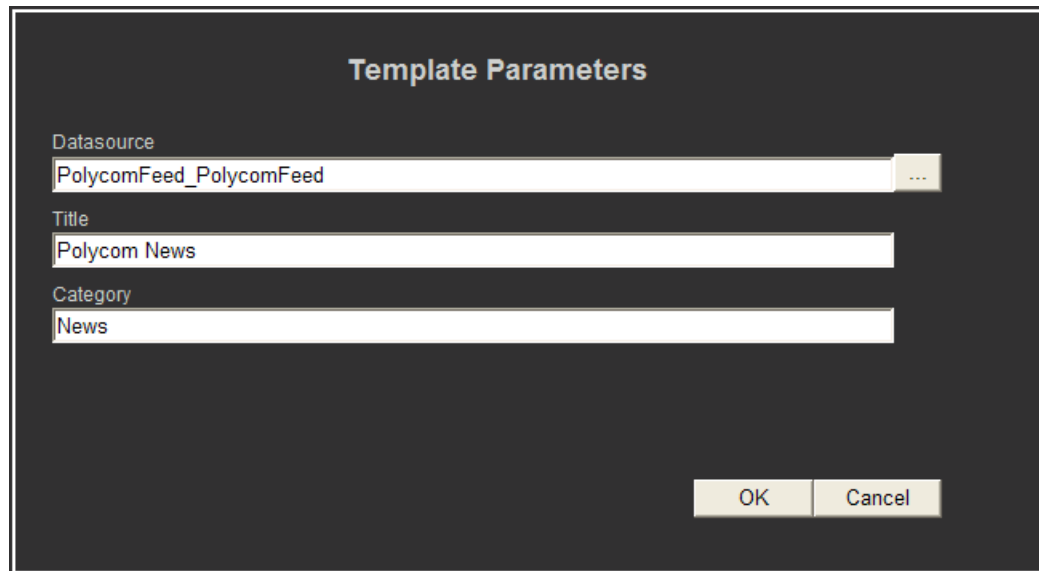
[Refresh List](#)

Select a template from the droplist below, then click Add Template to add it to the playlist

Available Templates:  Duration (sec): 30 Layer: Background

Item	Description	Duration	Layer					
1	Lower Crawl	00:00:00	1	Params	↑	↓	Remove	Load
2	Entertainment News	00:02:00	0	Params	↑	↓	Remove	Load
3	Trivia	00:02:00	0	Params	↑	↓	Remove	Load
4	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
5	Event Calendar PowerPoint	00:16:39	0	Params	↑	↓	Remove	Load
6	Breaking News	00:02:00	0	Params	↑	↓	Remove	Load
7	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
8	Video 4x3	00:16:39	0	Params	↑	↓	Remove	Load
9	Sports Headlines	00:02:00	0	Params	↑	↓	Remove	Load
10	Video 16x9	00:16:39	0	Params	↑	↓	Remove	Load
11	Weather 3Day	00:00:35	0	Params	↑	↓	Remove	Load
12	Product Catalog PowerPoint	00:16:39	0	Params	↑	↓	Remove	Load

- 9 To edit an existing template, click **Params** next to that template. Please note that only the Entertainment News, Breaking News, and Sports Headlines default templates are appropriate for RSS feeds imported
- To create a new template, choose the **Data Ticker Fullscreen** template from the Available Templates drop-down and click **Add Template**.

**10** The **Template Parameters** Window appears.

The screenshot shows a dialog box titled "Template Parameters". It contains three text input fields. The first field, labeled "Datasource", contains the text "PolycomFeed\_PolycomFeed" and has a small "..." button to its right. The second field, labeled "Title", contains the text "Polycom News". The third field, labeled "Category", contains the text "News". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

- a** Click the **Add File** or **...** button beside the Datasource Field. Locate the .xdsrc file on your computer and click **Open**.
- b** Remove all pathway and file type information from the chosen file. The Datasource field should contain only the file name of the .xdsrc file, without the file extension.

In our example,

C:\PolycomContent\Data\PolycomFeed\_PolycomFeed.xdsrc  
becomes PolycomFeed\_PolycomFeed in the Datasource field.

- c** Provide a title and category for the Template.

Click **OK**.

- 11** **Save** the Playlist, **Distribute** the Playlist to the target player or players, and click **Load on Player(s)**.

- 12 The new Template should appear in the PDS Player output. The Data Parser will update the Template as new material appears.





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# Non-Standard Installations

This chapter outlines potential changes to the standard Polycom Digital Signage Server. This chapter includes the following sections:

- [The PDS Server Configuration Utility](#)
- [Downloading and Installing the Agent](#)

## The PDS Server Configuration Utility

The Polycom Digital Signage Server includes a Configuration Utility to facilitate changes from the default Server settings. The Configuration Utility allows port, database, and setting changes.



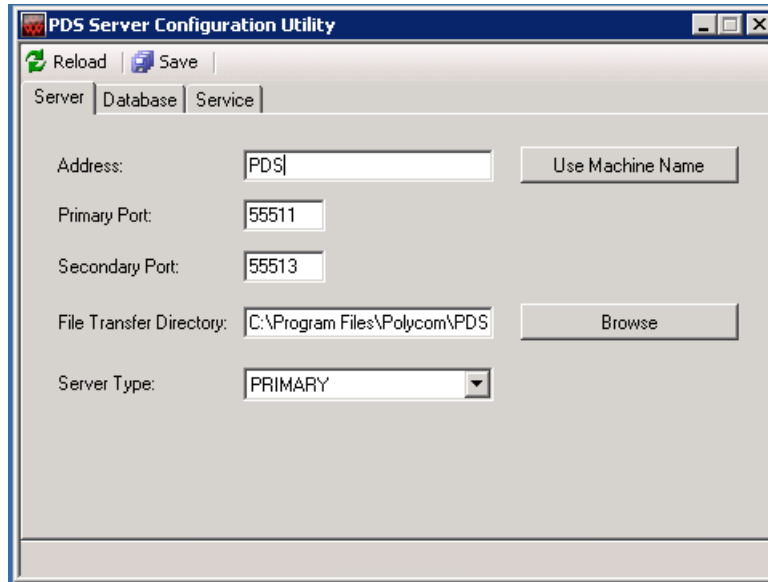
**NOTE:** Port and name changes made in the PDS Server will not be propagated to the Players. You will need to update each of the Players, either by installing a new Agent or by manually updating the server configuration.

After the setup processes detailed above, the PDS Server Configuration Utility can be used:

- To launch the Configuration Utility, open **Start > Programs > Polycom Digital Signage > PDS Server Configuration Utility**. The utility will appear.

- From the **Server** tab, administrators can designate a server address, the ports used by the server, the file transfer directory, and whether it is functioning as a primary or secondary server.

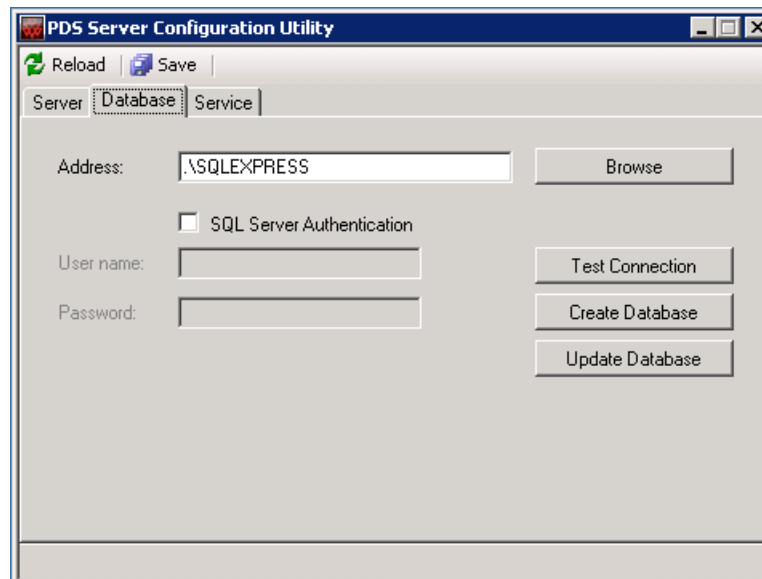
Port configuration information is detailed in the following section.



The screenshot shows the 'PDS Server Configuration Utility' window with the 'Server' tab selected. The window has a title bar with standard Windows window controls. Below the title bar are 'Reload' and 'Save' buttons. The 'Server' tab is active, and the 'Database' and 'Service' tabs are visible but inactive. The configuration fields are as follows:

- Address: PDS (with a 'Use Machine Name' button to the right)
- Primary Port: 55511
- Secondary Port: 55513
- File Transfer Directory: C:\Program Files\Polycom\PDS (with a 'Browse' button to the right)
- Server Type: PRIMARY (dropdown menu)

- From the **Database** tab, administrators can view database address and, if necessary, database authentication credentials.



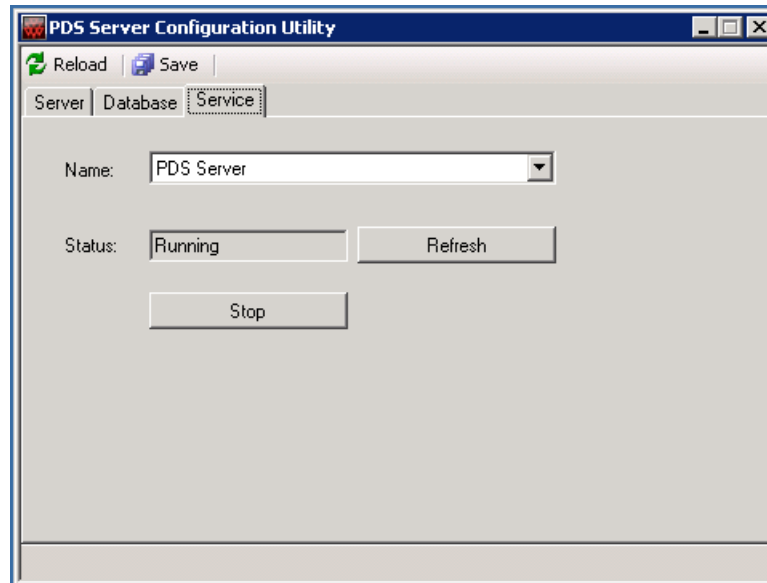
The screenshot shows the 'PDS Server Configuration Utility' window with the 'Database' tab selected. The window has a title bar with standard Windows window controls. Below the title bar are 'Reload' and 'Save' buttons. The 'Database' tab is active, and the 'Server' and 'Service' tabs are visible but inactive. The configuration fields are as follows:

- Address: .\SQLEXPRESS (with a 'Browse' button to the right)
- SQL Server Authentication
- User name: (empty text box)
- Password: (empty text box)
- Buttons: Test Connection, Create Database, Update Database



**NOTE:** Do not alter the default settings in the Database tab unless instructed to do so by Polycom support.

- From the **Service** tab, users can start, stop, and monitor the status of the PDS Server service.



## Renaming the Server

The PDS Server Configuration Utility allows you to rename the PDS Server.

### To rename the PDS Server:

- 1 Open the PDS Server Configuration Utility.
- 2 Open the **Server** tab. Indicate a new name or IP address for your PDS Server.
  - a Click **Use Machine Name** to use the name of the PDS Server appliance for the Server name.
- 3 Click **Save** in the PDS Server Configuration Utility toolbar.
- 4 In the **Service** tab, click **Stop** to stop the Polycom Digital Signage Server.
- 5 **Start** the service.
- 6 Make all necessary subsequent changes via the Remote Manager and Player agents.

## Port Configuration

The TCP ports used by the PDS Server can be changed via the PDS Server Configuration Utility.

**To change ports:**

- 1 Open the PDS Server Configuration Utility.
- 2 In the **Server** tab, provide a new **Primary Port** and **Secondary Port**.



**NOTE:** Please be sure that the ports you choose are open and available for use.

- 3 Click **Save** in the PDS Server Configuration Utility toolbar.
- 4 In the **Service** tab, click **Stop** to stop the Polycom Digital Signage Server.
- 5 **Start** the service.
- 6 If the Primary Port is open and available for use, the new port can be used in all subsequent connection and configuration processes.

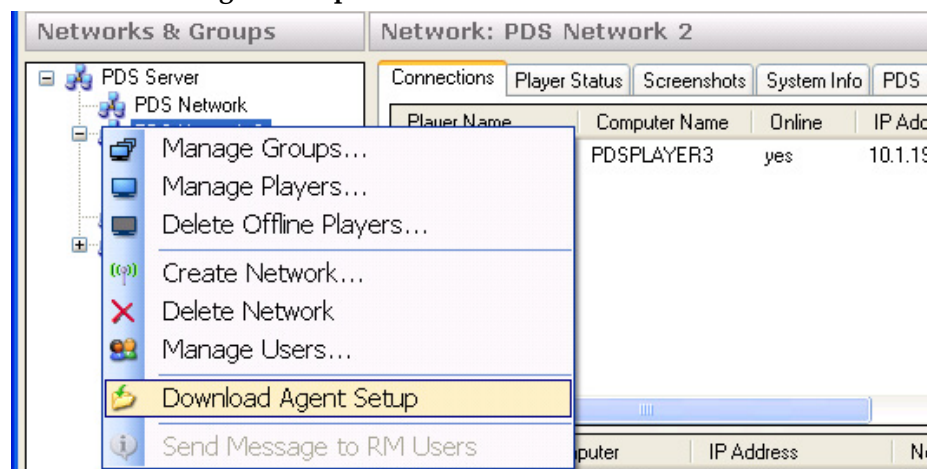
## Downloading and Installing the Agent

All PDS Players ship with the Player Agent preinstalled and preconfigured.

The default Player Agent will not be able to communicate with a Server that has been changed through the PDS Server Configuration Utility. Users who have made changes to the default Server settings must reinstall the Player Agent on each Player Appliance.

**To download the agent:**

- 1 Right-click on the network you intend to use in the left pane and choose **Download Agent Setup**.



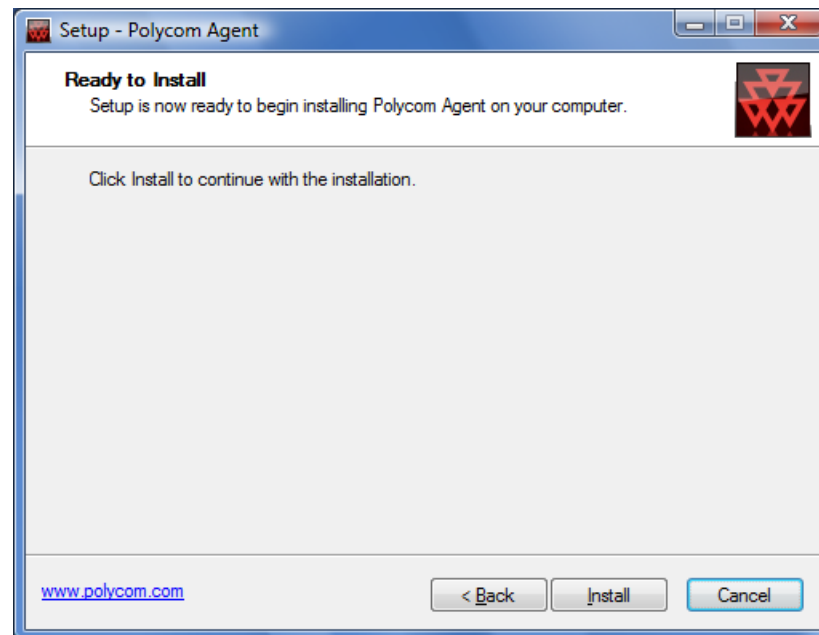
- 2 Download the installer and save it in a place that you will remember. You will need this installer for distribution to the Polycom Digital Signage Player.



- 3 Copy the Agent installer executable file from the download location to the PDS Player.
- 4 Directly or remotely access the Player appliance. double-click on the Agent installer. The setup wizard will appear. Click **Next**.



- 5 A license agreement will appear. Select **I agree** and click **Next**. A summary screen will appear; click **Install**.



- 6 No post-install actions are necessary. After the agent is installed, verify in the Remote Manager that the Player is now listed.

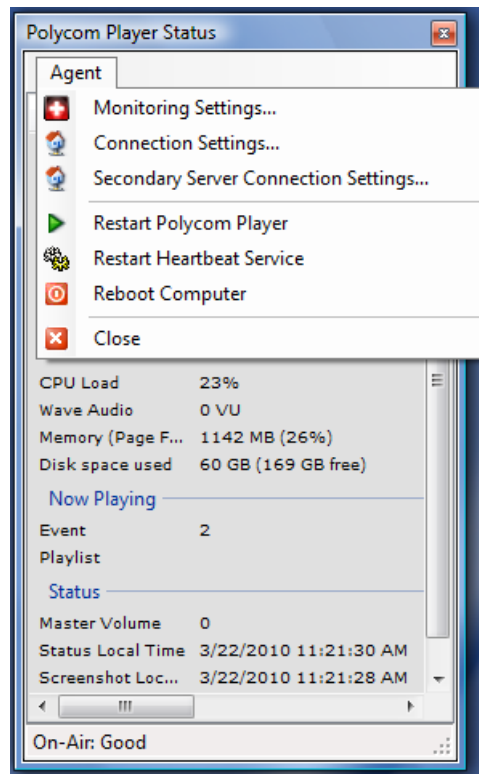
## Changing Agent Settings on a Player

Polycom recommends downloading and distributing a new Player Agent when configuration changes have been made. The Agent configuration can be directly changed on each Player, however, to reflect PDS Server setting changes.

- 1 Right-click on the Agent (red cross on red field) icon in the Windows Taskbar on the Player Appliance.

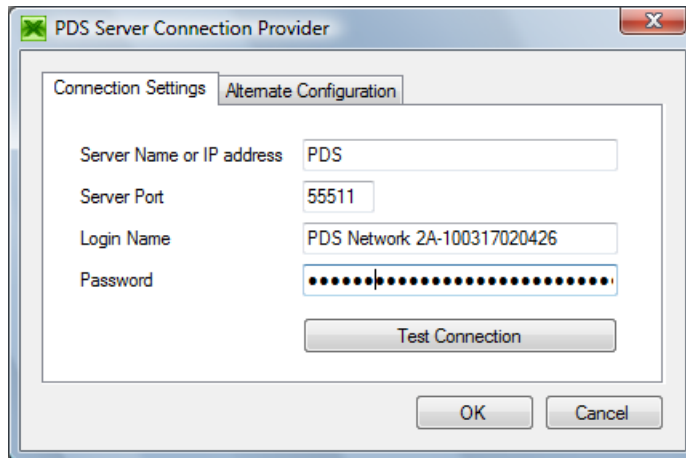


- 2 Select **Status** from the context menu that appears. The Polycom Player Status window will launch.
- 3 Click **Agent**. Select **Connection Settings** from the menu that appears.



- 4 In the **Connection Settings** tab, enter your new **Server Name** and/or **Server Port**.

Click **Test Connection** to confirm that the changes have been made correctly. Click **OK** to complete.





# A

## Appendix A: Player Commands

This appendix contains a list of the commands available for use in Polycom Digital Signage applications and required parameters:

- [Standard Commands](#)
- [Player-Specific Commands](#)

### Standard Commands

APPENDTOFILE|<Filename>|<Text to write. Replace line breaks with '<BR>' or '{BR}'>  
CLEARCACHE  
CLEARLAYER|<Layer (0 or 1)>  
CLEARCRAWL|<Layer (0 or 1)>  
CLEARCRAWLTEXT|<Layer (0 or 1)>  
CLEARKEYER|<Keyer Num>  
CLOSE  
COPYFILE|<Source file>|<Dest file>  
DELAY|<Delay in secs>  
DELETEFILE|<Filename>  
ENABLECONTROL|<Object name>|<Layer (0 or 1)>|<Enable (True or False)>  
ENDPROCESS|<Process name>  
EXECSCRIPT|<Script filename>  
FLUSHSERIALBUFFER  
LOADSCENE|<Keyer num>|<Scene xml filename>  
LOADTEMPLATE|<Template name>|<Layer (0 or 1)>|<Param List>|<StyleSheet Filename (optional)>|<Transition (Optional: 0-10)>  
MSGBOX|<Message text>  
MUTESPEAKER|<Mute (True/False)>

```

MUTEAUDIOCHANNEL|<Mixer channel>|<Mute (True/False)>
PLAYANIMATION|<Object
name>|<Layer>|<Offset>|<Duration>|<X1>|<X2>|<Y1>|<Y2>|<Opacity1
>|<Opacity2>|<ScaleX1>|<ScaleX2>|<ScaleY1>|<ScaleY2>
PLAYAUDIO|<Audio filename>
PLAYFLIPBOOK|<Object Name>|<Layer (0 or 1)>
PLAYKEYFRAMEANIMATION|<Animation name>|<Layer (0 or 1)>
RAWDEVICECOMMAND|<Device Command>|<Command Params>|<Layer (0 or
1)>
RESETALL
RESTARTTICKER|<Layer (0 or 1)|<TickerName>
SENDMONITORCOMMAND|<Port num>|<Monitor type (Defined in
MonitorControl.txt)>|<Command (Defined in MonitorControl.txt)>
SENDSERIAL|<Port num>|<Baud rate>|<Parity>|<Data bits>|<Stop
bits>|<Text to send>
SETBGCLIP|<Layer (0 or 1)>|<Clip filename>
SETCLIP|<Object name>|<Layer (0 or 1)>|<Clip filename>
SETCLOCK|<Year>|<Month>|<Day>|<Hour>|<Minute>|<Second>
SETCRAWLDATAFILE|<Data filename>|<Layer (0 or 1)>
SETCRAWLIMAGE|<Image filename>|<Layer (0 or 1)>
SETCRAWLTEXT|<Text>|<Layer (0 or 1)>
SETFLIPBOOK|<Object name>|<Layer (0 or 1)>|<Filename of first
flipbook image>|<Process render queue (True or False, optional,
default=True)>
SETIMAGE|<Object name>|<Layer (0 or 1)>|<Image
Filename>|<Process render queue (True or False, optional,
default=True)>
SETMASTERVOLUME|<Volume (0-100)>
SETOBJECTPOSITION|<Object name>|<Layer (0 or 1)>|<X pos>|<Y
pos>|<Width (optional)>|<Height (optional)>
SETSLIDEAUDIOPLAYLIST|<Filename (or list)>|<Layer>
SETSLIDEAUDIOPLAYLISTVOLUME|<Volume (0-100)>|<Layer>
SETTEXT|<Object name>|<Layer (0 or 1)>|<New text>|<Process
render queue (True or False, optional, default=True)>
SETVISIBLE|<Object name>|<Layer>|<Visible (True/False)>
SETVOLUME|<Mixer channel>|<Volume (0-100)>|<Device name or
index, optional>
SHELL|<Shell command>
SHOWMESSAGE|<Message text>

```

```

SIMPLECRAWL|<Layer>|<Image filename>|<BackColor
(Black=0)>|<ForeColor
(White=16777215)>|<YPos>|<Height>|<FontSize>|<'>' delimited
text>
SIMPLECRAWLUNICODE|<Layer>|<Image filename>|<BackColor
(Black=0)>|<ForeColor
(White=16777215)>|<YPos>|<Height>|<FontSize>|<'>' delimited
text>
SNAPSHOT|<OutputFilename>|<Width>|<Height>
STARTCRAWL|<Layer (0 or 1)>
STARTSLIDETICKER|<Layer>|<Ticker name>
STOPCRAWL|<Layer (0 or 1)>
STOPSLIDETICKER|<Layer>|<Ticker name>
SYNCFOLDERFILES|<Folder>|<File list>
WRITETOEVENTLOG|<Log message>
WRITETOFILE|<Filename>|<Text to write. Replace line breaks with
'<BR>' or '{BR}'>
WRITETOLOG|<Log message>

```

## Player-Specific Commands

```

CLEARALLPLAYLISTS
CLEARPLAYLIST|<Playlist number(optional, default=1)>
DONEXTEVENT
DOPREVIOUSSEVENT
ENABLEMONITOR|<True/False>
FIRSTEVENT|<Playlist number(optional, default=1)>
GOTOEVENT|<Event index>|<Playlist number(optional, default=1)>
GOTOFIRSTEVENT|<Playlist number(optional, default=1)>
LOADPLAYLIST|<Playlist filename>|<Auto start (Optional,
default=True)>|<StartIndex (optional, default=1)>|<Playlist
number(optional, default=1)>
LOADSCHEDULE|<Schedule filename>
MINIMIZE
NEXTEVENT|<Playlist number(optional, default=1)>
PREVIOUSSEVENT|<Playlist number(optional, default=1)>
RELOADEVENT|<Playlist number(optional, default=1)>
RESETCURRENTEVENTTIME|<Playlist number(optional, default=1)>
RESTART
SHUTDOWN

```

SETLICENSEKEY|<License Key>

STARTPLAYLIST|<Playlist number(optional, default=1)>

STOPPLAYLIST|<Playlist number(optional, default=1)>



---

# Appendix B: Data Parser

This appendix contains a tutorial, examples and a reference guide for creating custom data source definition files. Creating a data source definition is an advanced topic that requires in-depth knowledge of pattern matching, Internet protocols and formats such as HTTP, HTML and particularly XML.

This appendix includes the following sections:

- [Data Source Definition File Overview](#)
- [Data Source Tutorial](#)
- [Parsing Rule Reference Guide](#)

## Data Source Definition File Overview

A data source definition file contains a single XML <DataSource> element. A <DataSource> element contains a single <General> header element, followed by one or more <ParsingRule> and/or <DataItem> elements.

When Data Parser opens a definition file, it first reads the <General> element. Then it retrieves the data source's data and applies all top-level <ParsingRule> elements in the order they appear in the definition file. Finally, it applies all the <DataItem> elements, also in order of their appearance

Special Character	Replacement Entity Code
&	&amp;
<	&lt;
>	&gt;
"	&quot;
'	&#39;



**NOTE:** As data source definition files are XML code, care must be taken when using certain characters in parameter values. The characters in the table at the right must be replaced by their corresponding XML entity codes, or Data Parser will fail to load the data source definition file.

For example, the following is invalid:

```
<StartTag>"Hello & Goodbye"</StartTag>
```

Instead, the special characters must be replaced:

```
<StartTag>&quot;Hello &amp; Goodbye&quot;</StartTag>
```

Note that all XML entity codes start with an ampersand (&) and end with a semicolon.

## The General Element

The <General> element defines the basic parameters of the data source and the table into which the data source should be parsed. <General> contains five or six child elements:

- <Url> specifies the Internet location of the data source. Data Parser supports http, file, and ftp URLs. The URL should resolve into a text type, such as a plain text, HTML or XML file.
- <Database> identifies the database file into which parsed data should be saved.
- <AllowDuplicates> can be either True or False. When set to True, Data Parser will allow duplicate entries to be created from the parsed data. When set to False, Data Parser will discard duplicate entries.
- <RefreshInterval> specifies the number of seconds Data Parser waits before reloading the data source's URL.
- <TableStructure> defines the schema of the data table to be created from the parsed data. It requires a single attribute, Name, that specifies the name of the table. <TableStructure> contains child <Field> elements that define the columns of the table.\

The value of a field element is the name of the data table column. Each <Field> element requires a Type attribute specifying the column's type. Currently supported types are Text (a 255 character string), Memo (a 2048 character string), and Integer. The <Field> element also allows optional AllowEmpty and KeyField attribute.

AllowEmpty can be either True or False, and determines whether Data Parser will accept table entries with no value for this column. The default for AllowEmpty is True.

The KeyField attribute can also be either True or False. When set to True, Data Parser will require unique values in this column for all the entries in

the table, and will create an index for this column. The default for KeyField is False.

Regardless of the table structure schema, Data Parser always inserts two additional columns into the table:

- An **ID** column that contains a serial number for each row. Serial numbers start at 1 for the first row and are incremented by one for each additional row in the table.
- A **Last Update** column that contains the date and time the row was added to the table. This is generally the same value for all rows, unless Data Parser is creating a table with a particularly large number of rows or if the parsing work required for each row is quite long.
- An optional <PublishFile> element identifies an XML file which will contain a copy of the data table generated by this data source.

Here is a simple example of a <General> element. This example instructs Data Parser to parse the data feed at <http://www.example.com/news.html> every 300 seconds, and to store the results in a file named Example.mdb, in a table named SampleTable with three Text columns: Headline, Reporter, and Date.

```
<General>
  <Url>http://www.example.com/news.html</Url>
  <Database>Example.mdb</Database>
  <AllowDuplicates>True</AllowDuplicates>
  <RefreshInterval>300</RefreshInterval>
  <TableStructure>
    <Field Type="Text">Headline</Field>
    <Field Type="Text">Reporter</Field>
    <Field Type="Text">Date</Field>
  </TableStructure>
</General>
```

## The ParsingRule Element

The <ParsingRule> element is the backbone of the data source definition. The purpose of this element is to extract text from a source, optionally manipulate the extracted text in some way, and place the result in a destination. It helps to think of sources and destinations as containers of text.

A <ParsingRule> element can contain other <ParsingRule> elements. Child <ParsingRule> elements are run after the parent rule.

The <ParsingRule> element has 3 required attributes:

- Type specifies the type of parsing rule to be used. See the Data Source Definition Reference Guide for a complete list of parsing rule types.

- Result specifies the name of the container that should receive the output of the parsing rule. Ultimately, parsing rule results need to be placed into the data table fields defined in the <TableStructure> element, and so the names of the data table fields are valid values for the Result attribute. Other containers can also be created simply by naming them in a Result attribute. Any container named in a Result attribute, including data table fields, can be used as a Source in later <ParsingRule> elements.

If a Result attribute names an existing container, the container's contents are replaced with the output of the parsing rule.

- Source specifies the input text for the parsing rule. This can be either the original data feed or a container named in the Result attribute of a previous <ParsingRule> element. A special container named "Source" holds the original text obtained from the data source's URL. The contents of the "Source" container can be replaced by naming it in a Result attribute, just like any other container.

Definitions for all supported parsing rules are in the Parsing Rule Reference Guide at the end of this appendix.

Some parsing rules can work with an <Index> parameter. These are rules that extract a value from their Source container. The <Index> parameter identifies which occurrence of a value to extract. See the Reference Guide for more information relating to specific parsing rules. These "index-aware" rules are also used when processing <DataItem> elements (see below).

Some parsing rules support a special "tag" syntax for some or all of their parameters. These are identified as "taggable" in the Parsing Rule Reference Guide. The "tag" syntax provides two features:

- **Special character handling:** The following string codes are replaced with specific character sequences:
  - <cr> is replaced with a carriage return character (ASCII code 13)
  - <lf> is replaced with a line feed character (ASCII code 10)
  - <CrLf> is replaced with a carriage return (ASCII code 13) followed by a line feed (ASCII code 10). (This is the equivalent of using "<cr><lf>".)
  - <tab> is replaced with a tab character (ASCII code 9)
  - <space> is replaced with a space character (ASCII code 32)
- **Container substitution:** If a string between | characters is the name of an existing text container, the contents of the container replace the string and its | delimiters. For example, if a taggable parameter is "This is |SomeResult|" and there's a container named SomeResult that contains the text "awesome" then the parameter's value will be treated as "This is awesome".

Here are some simple examples of <ParsingRule> elements. The following parsing rule replaces all occurrences of "Football" in the original text of the data feed with "Baseball" and saves the result in a container named NewSport.

```
<ParsingRule Type="Replace" Source="Source" Result="NewSport">
```

```
<SearchText>Football</SearchText>
<NewText>Baseball</NewText>
</ParsingRule>
```

The following parsing rule sets the value of the City container to "New York, NY".

```
<ParsingRule Type="SetValue" Result="City">
<Value>New York, NY</Value>
</ParsingRule>
```

The following parsing rule replaces all occurrences of "Vanilla" with "Chocolate" in the original text of the data feed. Note how the special "Source" container is being overwritten by this parsing rule - after running this rule, the special "Source" container will no longer contain the word "Vanilla".

```
<ParsingRule Type="Replace" Source="Source" Result="Source">
<SearchText>Vanilla</SearchText>
<NewText>Chocolate</NewText>
</ParsingRule>
```

The following parsing rule uses a taggable parameter to replace all occurrences of the two lines

```
Fred Flintstone
Barney Rubble
```

with the single word "Dino".

```
<ParsingRule Type="Replace" Source="Source" Result="Source">
<SearchText>Fred Flintstone<crLf>BarneyRubble</SearchText>
<NewText>Dino</NewText>
</ParsingRule>
```

The following parsing rule uses a taggable parameter to replace all occurrences of "Somebody" with the contents of the container called PersonName.

```
<ParsingRule Type="Replace" Source="Source" Result="Source">
<SearchText>Somebody</SearchText>
<NewText>|PersonName|</NewText>
</ParsingRule>
```

## The DataItem Element

<DataItem> elements are used to repeatedly apply a list of parsing rules. This allows Data Parser to fill a table with multiple rows of data. For example, the headlines from a news feed could be inserted, one per row, in a table.

The <DataItem> element has two optional attributes:

- URL can be used to specify a new source that is only used for the parsing rules contained in the <DataItem> element. The URL is resolved and its contents are placed into the "Source" container before any of the DataItem's parsing rules are applied.
- NumRecords specifies how many times to apply the DataItem's parsing rules. Any <ParsingRule> elements contained in a <DataItem> are applied in their order of appearance up to NumRecords times, or until an index-aware parsing rule returns an empty value.

Each time a DataItem's parsing rules are applied, the rules' Results are written into a new set of empty containers. A new row is added to the data table being created, and any parsing rule Results that identify a data table field are written to the new row.

Setting NumRecords to 0 (which is the default value) is the same as setting it to 999.

Here is a simple example of a <DataItem> element that contains a single parsing rule. The following defines a table with a City column and adds 5 rows to that table, each containing the value "New York, NY".

```
<DataSource>
<General>
<RefreshInterval>...</RefreshInterval>
<AllowDuplicates>...</AllowDuplicates>
<Url>...</Url>
<Database>...</Database>
<TableStructure Name="SampleTable">
<Field Type="Text">City</Field>
</TableStructure>
</General>
<DataItem NumRecords="5">
<ParsingRule Type="SetValue" Result="City">
<Value>New York, NY</Value>
</ParsingRule>
</DataItem>
</DataSource>
```

Here how to use a <DataItem> element to parse the string "(x=1)(y=2)(z=3)". Assume we want to extract each equation's variable (x or y or z) and value (1 or 2 or 3).

```
<DataItem>
<ParsingRule Type="GetTag" Source="Source" Result="Equation">
<StartTag></StartTag>
<EndTag></EndTag>
</ParsingRule>
```

```
<ParsingRule Type="TrimFromStart" Source="Equation"
Result="Variable">
<SearchText>=</SearchText>
</ParsingRule>
<ParsingRule Type="TrimToEnd" Source="Equation" Result="Value">
<SearchText>=</SearchText>
</ParsingRule>
</DataItem>
```

A `<DataItem>` element should contain one or more index-aware parsing rules. All of a `DataItem`'s parsing rules are applied on each iteration. However, if a given `DataItem` parsing rule itself contains child rules, those child rules are not passed any index information for the current iteration. That is, child rules are never treated as index-aware. For an example of this, see the Data Source Tutorial below.

## Data Source Tutorial

This section walks through the construction of a Data Source definition that extracts weather data from the U.S. National Weather Service web site.

This tutorial assumes the reader is familiar with HTML syntax.

NOTE: This tutorial was written using the U.S. Weather Service web site. The U.S. Weather Service may have changed their web site since writing, and so there is no guarantee that this tutorial will still work now. The tutorial is presented purely to illustrate Data Parser concepts.

In this tutorial we'll parse the weather data for New York City as obtained from the URL <http://www.srh.noaa.gov/zipcity.php?inputstring=10005>.

## General Settings

The general settings for the weather data source are straightforward. We tell Data Parser to refresh the feed every hour (i.e. 3600 seconds), to allow duplicate rows in the table, to fetch the feed from <http://www.srh.noaa.gov/zipcity.php?inputstring=10005>, and to store the parsed data in a table named Weather in the DataFeeds.mdb database:

```
<General>
  <RefreshInterval>3600</RefreshInterval>
  <AllowDuplicates>True</AllowDuplicates>

  <Url>http://www.srh.noaa.gov/zipcity.php?inputstring=10005</Url>
  <Database>DataFeeds.mdb</Database>
  <TableStructure Name="Weather">
    <Field Type="Text">DayPart</Field>
    <Field Type="Text">Condition</Field>
    <Field Type="Text">Temp</Field>
    <Field Type="Memo">ImageURL</Field>
    <Field Type="Memo">LocalImage</Field>
  </TableStructure>
</General>
```

The Weather table we create has the following fields:

- DayPart: The part of the day that described by the weather data in the current row. For example, "Today" or "Friday Night".
- Condition: The weather conditions for the day part. For example, "Mostly Sunny" or "Partly Cloudy".
- Temp: The temperature for the day part.
- ImageURL: The URL of the image used on the web site to depict the weather for the day part.
- LocalImage: The path and file name of a local copy of the image. We'll download the image as we parse the web page.
- Building the Data Source Definition

Resolving the URL (e.g. by opening it in a browser and viewing the source) gives us the following raw HTML code. This code contains a lot of extraneous information. The part we're interested in is the "Forecast at a Glance" section, which is highlighted in below.

```
<!doctype html public "-//W3C//DTD HTML 4.0
Transitional//EN"><html><head>
<title>7-Day Forecast for Latitude 40.74N and Longitude
-74.01W</title><link rel="STYLESHEET" type="text/css"
href="fonts/main.css"></head><body leftmargin="0"
```





```

pdate"><b>Last Update:</b></a> 8:38 am EDT Jul 5, 2007<br><a
href="http://www.weather.gov/glossary/index.php?word=foreca
st+valid+for"><b>Forecast Valid:</b></a> 11am EDT Jul 5,
2007-6pm EDT Jul 11, 2007</td>

```

```
</tr>
```

```
</table>
```

```
<table width="100%" border="0" align="center"
cellpadding="0" cellspacing="0">
```

```
<tr><td align="left"></td>
```

```
<td align="right"></td>
```

```
</tr>
```

```
<tr><td align="left" colspan="2">
```

```

```

```
</td>
```

```
</tr>
```

```
</table>
```

```
</td></tr>
```

```
<tr><td>
```

```
<table width="100%" border="0" align="center"
cellpadding="0" cellspacing="0">
```

```
<tr valign="top" align="center">
```

```
<td width="11%"><b>Today<br></b><br><br>Heavy<br>Rain<br>Hi <font
color="#FF0000">81&deg;F</font></td><td
```

```
width="11%"><b>Tonight<br></b><br><br>Heavy<br>Rain<br>Lo <font
color="#0033CC">69&deg;F</font></td><td
```

```
width="11%"><b>Friday<br></b><br><br>Slight
Chc<br>Tstms<br>Hi <font
color="#FF0000">85&deg;F</font></td><td
```

```
width="11%"><b>Friday<br>Night</b><br><br>Slight
Chc<br>Tstms<br>Lo <font
```

```

color="#0033CC">67&deg;F</font></td><td
width="11%"><b>Saturday<br></b><br><br>Mostly<br>Sunny<br>Hi <font
color="#FF0000">86&deg;F</font></td><td
width="11%"><b>Saturday<br>Night</b><br><br>Mostly<br>Clear<br>Lo <font
color="#0033CC">69&deg;F</font></td><td
width="11%"><b>Sunday<br></b><br><br>Mostly<br>Sunny<br>Hi <font
color="#FF0000">92&deg;F</font></td><td
width="11%"><b>Sunday<br>Night</b><br><br>Partly<br>Cloudy<br>Lo <font
color="#0033CC">75&deg;F</font></td><td
width="11%"><b>Monday<br></b><br><br>Partly<br>Cloudy<br>Hi
<font color="#FF0000">91&deg;F</font></td></tr>
</table>

```

```

<table width="100%" border="0" align="center"
cellpadding="0" cellspacing="0">

```

```

<tr valign="top">

```

```

<td valign="top" align="left" width="50%">

```

```

<br>

```

```

<br><a name="contents"></a>

```

```

Hazardous weather condition(s):<br><div
align="center"><br><a
href="showsigwx.php?warnzone=NYZ072&warncounty=NYC061&fi
rezone=NYZ072&local_place1=New+York&product1=Hazardous+Weath
er+Outlook"><span class="warn">Hazardous Weather
Outlook</span></a><br></div><br>

```

```

<b>Today: </b>Showers and thunderstorms likely, mainly after
noon. Some of the storms could produce gusty winds and heavy
rain. Mostly cloudy, with a high near 81. Southwest wind
between 8 and 10 mph. Chance of precipitation is 70%. New
rainfall amounts between a tenth and quarter of an inch,
except higher amounts possible in thunderstorms.

```

```

<br><br><b>Tonight: </b>Periods of showers and thunderstorms,
mainly before 2am. Some of the storms could produce gusty
winds and heavy rain. Low around 69. West wind between 7 and
10 mph. Chance of precipitation is 80%. New rainfall amounts
between a quarter and half of an inch possible.

```

```

<br><br><b>Friday: </b>A slight chance of showers and
thunderstorms after noon. Partly cloudy, with a high near
85. West wind between 7 and 16 mph. Chance of precipitation

```

```

is 20%.<br><br><b>Friday Night: </b>A slight chance of
showers and thunderstorms before 10pm. Partly cloudy, with
a low around 67. Northwest wind between 6 and 13 mph. Chance
of precipitation is 20%.<br><br><b>Saturday: </b>Mostly
sunny, with a high near 86. West wind between 8 and 16 mph.
<br><br><b>Saturday Night: </b>Mostly clear, with a low
around 69. <br><br><b>Sunday: </b>Mostly sunny, with a high
near 92. <br><br><b>Sunday Night: </b>Partly cloudy, with a
low around 75. <br><br><b>Monday: </b>Partly cloudy, with a
high near 91. <br><br><b>Monday Night: </b>A chance of
showers and thunderstorms. Partly cloudy, with a low around
73. Chance of precipitation is 30%.<br><br><b>Tuesday:
</b>A chance of showers and thunderstorms. Partly cloudy,
with a high near 88. Chance of precipitation is
30%.<br><br><b>Tuesday Night: </b>A chance of showers and
thunderstorms. Partly cloudy, with a low around 72. Chance
of precipitation is 30%.<br><br><b>Wednesday: </b>Partly
cloudy, with a high near 89. <br><br></td>

```

(We've omitted the rest of the HTML code, as it's not pertinent to this tutorial.)

Our first task is to isolate the part of the data that contains the information we want. First we remove everything before the "Forecast at a Glance" string using a TrimToEnd rule:

```

<ParsingRule type="TrimToEnd" source="Source"
result="Source">
  <SearchText>Forecast at a Glance</SearchText>
</ParsingRule>

```

Note that this rule overwrites the Source container, which initially contains the entire HTML text.

Next we extract the contents of the first <table> element after the "Forecast at a Glance" text using a GetTag rule:

```

<ParsingRule type="GetTag" source="Source" result="Source">
  <StartTag>&lt;table</StartTag>
  <EndTag>&lt;/table&gt;</EndTag>
</ParsingRule>

```

Note how the < and > characters in the StartTag and EndTag parameters are replaced with XML character entity codes &lt; and &gt;.

The above two rules replace the full HTML code in the Source container with the following:

```

width="100%" border="0" align="center" cellpadding="0"
cellspacing="0">
<tr valign="top" align="center">
<td width="11%"><b>Today<br></b><br><br>Heavy<br>Rain<br>Hi <font
color="#FF0000">81&deg;F</font></td><td

```

```

width="11%"><b>Tonight<br></b><br><br>Heavy<br>Rain<br>Lo <font
color="#0033CC">69&deg;F</font></td><td
width="11%"><b>Friday<br></b><br><br>Slight Chc<br>Tstms<br>Hi
<font color="#FF0000">85&deg;F</font></td><td
width="11%"><b>Friday<br>Night</b><br><br>Slight Chc<br>Tstms<br>Lo
<font color="#0033CC">67&deg;F</font></td><td
width="11%"><b>Saturday<br></b><br><br>Mostly<br>Sunny<br>Hi <font
color="#FF0000">86&deg;F</font></td><td
width="11%"><b>Saturday<br>Night</b><br><br>Mostly<br>Clear<br>Lo <font
color="#0033CC">69&deg;F</font></td><td
width="11%"><b>Sunday<br></b><br><br>Mostly<br>Sunny<br>Hi <font
color="#FF0000">92&deg;F</font></td><td
width="11%"><b>Sunday<br>Night</b><br><br>Partly<br>Cloudy<br>Lo <font
color="#0033CC">75&deg;F</font></td><td
width="11%"><b>Monday<br></b><br><br>Partly<br>Cloudy<br>Hi <font
color="#FF0000">91&deg;F</font></td></tr>

```

This is a single HTML table row that contains all the weather data we need. Before we extract that data, we use the `ReplaceCharacterCodes` rule to replace all HTML character codes (e.g. `&deg;`) with their true characters (e.g. the degree symbol `°`):

```
<ParsingRule type="ReplaceCharacterCodes" source="Source"
result="Source" />
```

Now that the text characters are in order, we want to set about extracting each day part's forecast. We use a `DataItem` element to apply a set of parsing rules 9 times, once for each day part in the HTML code:

```
<DataItem NumRecords="9" ClearTableOnStart="True">
...
</DataItem>
```

All of the remaining parsing rules in this tutorial are contained in this `DataItem` element.

In the HTML we've isolated, each cell of the table row contains the forecast for a day part. For example, the cell contains the forecast for "Today" (we've reformatted the code below to make it easier to see the forecast data):

```
<td width="11%">
<b>Today<br></b>
<br>
<imgsrc="/images/wtf/tsra70.jpg"
width="55" height="58"
alt="Heavy Rain Chance for Measurable Precipitation 70%"
title="Heavy Rain Chance for Measurable Precipitation 70%" >
<br>
Heavy<br>Rain
<br>
Hi <font color="#FF0000">81° F</font>
</td>
```

Each cell contains the day part's name (e.g. "Today"), the conditions (as the image's alternative text, e.g. "Heavy Rain Chance for Measurable Precipitation 70%"), the temperature (e.g. "81°F") and an image file (e.g. "/images/wtf/tsra70.jpg"). We'll extract each of these pieces of information in turn.

First, we need to isolate a given day part's table cell. We do this using a `GetTag` rule to isolate the text between the `<td>` and `</td>` tags:

```
<ParsingRule type="GetTag" Source="Source" result="DaySource">
<StartTag>&lt;td </StartTag>
<EndTag>&lt;/td>&gt;</EndTag>
</ParsingRule>
```

The `GetTag` rule is index-aware, so because it is inside a `<DataItem>` element it will extract each table cell in turn. We used the `<DataItem>` element to apply its rules 9 times, so this `GetTag` rule will extract each of the 9 table cells. On the first iteration, the rule extracts the contents of the first table cell:

```
width="11%"><b>Today<br></b><br><br>Heavy<br>Rain<br>Hi <font color="#FF0000">81° F</font>
```

On the second iteration, the rule extracts the contents of the second table cell:

```
width="11%"><b>Tonight<br></b><br><br>Heavy<br>Rain<br>Lo <font color="#0033CC">69° F</font>
```

And so on for each of the 9 iterations.

Now that we've isolated the weather data for a single day part, we can extract that data and save it in a row of our table. First we obtain the name of the day part using a GetTag rule to extract the text the lies between the <b> and </b> tags in the DaySource container:

```
<ParsingRule type="GetTag" source="DaySource" result="DayPart">
<StartTag>&lt;b&gt;</StartTag>
<EndTag>&lt;/b&gt;</EndTag>
</ParsingRule>
```

There's a subtle problem here. What we want is to extract the text from between the first (indeed, the only) pair of <b> and </b> tags. However, simply adding the above rule to the <DataItem> element will not work:

```
<DataItem NumRecords="9" ClearTableOnStart="True">
<ParsingRule type="GetTag" source="Source" result="DaySource">
<StartTag>&lt;td </StartTag>
<EndTag>&lt;/td&gt;</EndTag>
</ParsingRule>
<ParsingRule type="GetTag" source="DaySource" result="DayPart">
<StartTag>&lt;b&gt;</StartTag>
<EndTag>&lt;/b&gt;</EndTag>
</ParsingRule>
</DataItem>
```

The above code will only extract the first day part's name, but will not extract anything for subsequent day parts. To understand why, recall that the GetTag rule is index-aware. This means that on each iteration of the DataItem's rules, GetTag is trying to obtain that iteration's occurrence of the StartTag and EndTag values. So on the first iteration, the second GetTag rule retrieves the text between first occurrence of <b> and </b>. But on the second iteration that rule tries to retrieve the text between the second occurrence of <b> and </b>. Since there is no second occurrence of <b> and </b> in the DaySource container the rule retrieves nothing.

To achieve what we want, the second rule has to be made a child of the first rule:

```
<DataItem NumRecords="9" ClearTableOnStart="True">
<ParsingRule type="GetTag" source="Source" result="DaySource">
<StartTag>&lt;td </StartTag>
<EndTag>&lt;/td&gt;</EndTag>

<ParsingRule type="GetTag" source="DaySource" result="DayPart">
<StartTag>&lt;b&gt;</StartTag>
<EndTag>&lt;/b&gt;</EndTag>
</ParsingRule>
```

```
</ParsingRule>
</DataItem>
```

This changes the way Data Parse handles the second rule. Because it is a now child rule, the current DataItem iteration is not passed to it as an Index value. This makes the rule use the default index value (1), and so it now always retrieves the text between the first occurrence of <b> and </b>.

A different way we could have solved this problem would be to instead add an Index parameter to the second GetTag rule so that it always extracts from the first occurrence:

```
<DataItem NumRecords="9" ClearTableOnStart="True">
<ParsingRule type="GetTag" Source="Source" result="DaySource">
<StartTag>&lt;td </StartTag>
<EndTag>&lt;/td&gt;</EndTag>
</ParsingRule>
<ParsingRule type="GetTag" source="DaySource" result="DayPart">
<StartTag>&lt;b&gt;</StartTag>
<EndTag>&lt;/b&gt;</EndTag>
<Index>1</Index>
</ParsingRule>
</DataItem>
```

However, using child rules is preferred because it's easy to forget to include that Index parameter.

Let's return to the tutorial. Now that we have the day part name, but if you look carefully at what's between the <b> and </b> tags you'll see that the day part name always has a "<br>" string. Sometimes it's just at the end of the string, as in "Friday<br>", and other times it's in the middle, as in "Friday<br>Night". Let's replace that "<br>" with a space:

```
<ParsingRule type="Replace" source="DayPart" result="DayPart">
<SearchText>&lt;br&gt;</SearchText>
<NewText>&lt;space&gt;</NewText>
</ParsingRule>
```

Note the use of "<space>" (with the < and > substituted by entity codes) as the NewText parameter. We have to use the <space> token because XML strips spaces from values. If we had simply used a space character, as in <NewText></NewText>, we would actually be removing the SearchText instead of replacing it with a space. This would result in translating day part names like "Friday<br>Night" to "FridayNight" instead of "Friday Night".

With the day part name safely in the DayPart field of the table, let's extract the weather conditions. For this, we want part of the phrase that's used as the title attribute of the <img> element (such as title="Heavy Rain Chance for Measurable Precipitation 70%"). We only want the "Heavy Rain" part, so we want to drop the "Chance for ..." text.



First we need to extract the value of the title attribute using another GetTag rule (which, again, is inserted as a child of the first rule) that extracts the text between "title=" (including the opening quote character) and the closing quote character:

```
<ParsingRule type="GetTag" source="DaySource"
result="Condition">
<StartTag>title="&quot;;</StartTag>
<EndTag>&quot;;</EndTag>
</ParsingRule>
```

Then we remove the "Chance for" string, and any text that follows it, using the TrimFromStart rule:

```
<ParsingRule type="TrimFromStart" source="Condition"
result="Condition">
<SearchText>Chance for</SearchText>
</ParsingRule>
```

This leaves us with the desired text, but with a trailing space character (e.g. "Heavy Rain "). We remove this extra space with a Trim rule:

```
<ParsingRule type="Trim" source="Condition" result="Condition"
/>
```

Why didn't we just use a <space> token in the SearchText parameter of the TrimFromStart rule (e.g. <SearchText>&lt;space&gt;Chance for</SearchText>)? Because TrimFromStart's SearchText parameter does not support the special "tag" syntax, so it doesn't interpret the <space> token as a space character.

Now let's turn to the temperature. In each table cell, the temperature string is always found between a <br> tag and a closing </font> tag (e.g. <br>Hi <font color="#FF0000">81°F</font>). So we use those tags in a GetTag rule to extract the temperature:

```
<ParsingRule type="GetTag" source="DaySource" result="Temp">
<StartTag>&lt;br&gt;</StartTag>
<EndTag>&lt;/font&gt;</EndTag>
</ParsingRule>
```

This gets us the temperature, but with the string "<font color="#FF0000">" embedded inside. We want to keep the "Hi" or "Lo" part, so we just want to remove that opening <font ...> element. If you look at the HTML code, you'll see that "Hi" temperatures get a font color of #FF0000 while "Lo" temperatures get #0033CC. Since we want to remove the font tag regardless of what color is specified, we use a ReplaceTag rule to remove everything from the "<font" to the ">":

```
<ParsingRule type="ReplaceTag" source="Temp" result="Temp">
<StartTag>&lt;font</StartTag>
<EndTag>&gt;</EndTag>
<NewText/>
</ParsingRule>
```

Finally, let's extract the day part's weather image URL and download the image file so that it's available on the local machine. The image URL is made up of the web site address (<http://www.erh.noaa.gov>) concatenated with the value of the HTML `<img>` element's `src` attribute. First, we extract the value of the `src` attribute with a `GetTag` rule:

```
<ParsingRule type="GetTag" source="DaySource"
result="ImageURL">
<StartTag>img src=&quot;;</StartTag>
<EndTag>&quot;;</EndTag>
</ParsingRule>
```

Then we use a `StrCat` rule to prepend the web site's address to form the complete URL:

```
<ParsingRule type="StrCat" result="ImageURL">
<String1>http://www.erh.noaa.gov</String1>
<String2>|ImageURL|</String2>
<AddSpace>False</AddSpace>
</ParsingRule>
```

`StrCat`'s `String1` and `String2` parameters are taggable, so we use the special `|ImageURL|` syntax to specify the contents of the `ImageURL` container as the value for `String2`. These preceding two rules give us a full URL for the image (e.g. <http://www.erh.noaa.gov/images/wtf/tsra70.jpg>).

We can now download the image file. First we obtain the image's file name with a `GetTag` rule that extracts strings that lie between a `"/"` and `".jpg"`:

```
<ParsingRule type="GetTag" source="ImageURL"
result="LocalImage">
<StartTag>/</StartTag>
<EndTag>.jpg</EndTag>
</ParsingRule>
```

This extracts `"tsra70"` from the `ImageURL` container. This seems counter-intuitive: Why didn't the `GetTag` rule instead extract `"/www.erh.noaa.gov/images/wtf/tsra70"` (i.e. everything between the first `"/"` and `".jpg"`)? The answer lies in how `GetTag` handles nested tags. `GetTag` always returns the innermost instance. For example, if the source string were `"Mary had a <<li<<tt>>le>> lamb"` and the `StartTag` were `"<<"` and the `EndTag` were `">>"`, then `GetTag` would return `"tt"`.

What this means in our case is that when `GetTag` notices that the `StartTag` (`"/"`) still shows up in the string following its first occurrence, `GetTag` will move forward through the string until the `StartTag` no longer appears. Thus for `"http://www.erh.noaa.gov/images/wtf/tsra70.jpg"` `GetTag` analyses the following strings:

```
http://www.erh.noaa.gov/images/wtf/tsra70.jpg
/www.erh.noaa.gov/images/wtf/tsra70.jpg
/images/wtf/tsra70.jpg
/wtf/tsra70.jpg
```

```
/tsra70.jpg
```

Only when GetTag reaches that last string does it assume its found the innermost StartTag, and so then it returns whatever lies between the StartTag and the EndTag.

With the (extensionless) image file name in hand we can now construct a local path for the image file, and restore the file's extension, using a couple of StrCat rules. Let's store the downloaded images in the C:\NOAAImages\ directory:

```
<ParsingRule type="StrCat" source="" result="LocalImage">
<String1>C:\NOAAImages\</String1>
<String2>|LocalImage|</String2>
</ParsingRule>
<ParsingRule type="StrCat" source="" result="LocalImage">
<String1>|LocalImage|</String1>
<String2>.jpg</String2>
</ParsingRule>
```

With the image file's local name set in the LocalImage container we can now use GetImage to download the file:

```
<ParsingRule type="GetImage" source="" result="">
<Url>|ImageURL|</Url>
<LocalFilename>|LocalImage|</LocalFilename>
</ParsingRule>
```

This rule downloads the file at the URL stored in the ImageURL container and saves it in the file named in the LocalImage container.

This completes the tutorial. The final definition file is shown below.

```
<DataSource>
<General>
<RefreshInterval>3600</RefreshInterval>
<AllowDuplicates>True</AllowDuplicates>

<Url>http://www.srh.noaa.gov/zipcity.php?inputstring=10005<
/Url>
<Database>DataFeeds.mdb</Database>
<TableStructure Name="Weather">
<Field Type="Text">DayPart</Field>
<Field Type="Text">Condition</Field>
<Field Type="Text">Temp</Field>
<Field Type="Memo">ImageURL</Field>
<Field Type="Memo">LocalImage</Field>
</TableStructure>
</General>
```

```

<ParsingRule type="TrimToEnd" source="Source"
result="Source">
<SearchText>Forecast at a Glance</SearchText>
</ParsingRule>
<ParsingRule type="GetTag" source="Source" result="Source">
<StartTag>&lt;table</StartTag>
<EndTag>&lt;/table&gt;</EndTag>
</ParsingRule>
<ParsingRule type="ReplaceCharacterCodes"
source="Source"
result="Source" />
<DataItem NumRecords="9" ClearTableOnStart="True">
<ParsingRule type="GetTag" source="Source"
result="DaySource">
<StartTag>&lt;td </StartTag>
<EndTag>&lt;/td&gt;</EndTag>
<ParsingRule type="GetTag" source="DaySource"
result="DayPart">
<StartTag>&lt;b&gt;</StartTag>
<EndTag>&lt;/b&gt;</EndTag>
</ParsingRule>
<ParsingRule type="Replace" source="DayPart"
result="DayPart">
<SearchText>&lt;br&gt;</SearchText>
<NewText>&lt;space&gt;</NewText>
</ParsingRule>
<ParsingRule type="GetTag" source="DaySource"
result="Condition">
<StartTag>title=&quot;</StartTag>
<EndTag>&quot;</EndTag>
</ParsingRule>
<ParsingRule type="TrimFromStart"
source="Condition"
result="Condition">
<SearchText>Chance for</SearchText>
</ParsingRule>
<ParsingRule type="Trim" source="Condition"
result="Condition" />
<ParsingRule type="GetTag" source="DaySource" result="Temp">
<StartTag>&lt;br&gt;</StartTag>

```

```

<EndTag>&lt;/font&gt;</EndTag>
</ParsingRule>
<ParsingRule type="ReplaceTag" source="Temp" result="Temp">
<StartTag>&lt;font</StartTag>
<EndTag>&gt;</EndTag>
<NewText/>
</ParsingRule>
<ParsingRule type="GetTag" source="DaySource"
result="ImageURL">
<StartTag>img src=&quot;</StartTag>
<EndTag>&quot;</EndTag>
</ParsingRule>
<ParsingRule type="StrCat" result="ImageURL">
<String1>http://www.erh.noaa.gov</String1>
<String2>|ImageURL|</String2>
<AddSpace>False</AddSpace>
</ParsingRule>
<ParsingRule type="GetTag" source="ImageURL"
result="LocalImage">
<StartTag></StartTag>
<EndTag>.jpg</EndTag>
</ParsingRule>
<ParsingRule type="StrCat" source="" result="LocalImage">
<String1>C:\NOAAImages\</String1>
<String2>|LocalImage|</String2>
</ParsingRule>
<ParsingRule type="StrCat" source="" result="LocalImage">
<String1>|LocalImage|</String1>
<String2>.jpg</String2>
</ParsingRule>
<ParsingRule type="GetImage" source="" result="">
<Url>|ImageURL|</Url>
<LocalFilename>|LocalImage|</LocalFilename>
</ParsingRule>
</ParsingRule>
</DataItem>
</DataSource>

```

## Parsing Rule Reference Guide

This section describes all the parsing rules you can use with Data Parser.

### GetImage

The GetImage rule downloads a file (not just image files) from a URL to a local file.

The Source and Result attributes are required, but ignored.

#### Parameters:

- Url (taggable): The URL for the file to download.
- LocalFilename (taggable): The path and name to save the file as.

#### Example:

The following rule downloads the file home\_main\_polycom.jpg from www.polycom.com and saves it as C:\polycom\_banner.jpg.

```
<ParsingRule Type="GetImage" Source="" Result="">  
<Url>http://www.polycom.com/images/home_main_polycom.jpg</Url>  
<LocalFilename>C:\polycom_banner.jpg</LocalFilename>  
</ParsingRule>
```

### GetTag

The GetTag rule extracts text from between a pair of strings.

#### Parameters:

- StartTag (taggable): The starting delimiter of the text to extract.
- EndTag (taggable): The ending delimiter of the text to extract.
- Index (optional): Which occurrence of the text to extract.

#### Examples:

The following rule extracts whatever text lies between the first occurrence of "here" and "there".

```
<ParsingRule Type="GetTag" Source="Source" Result="Replaced">  
<StartTag>here</StartTag>  
<EndTag>there</EndTag>  
</ParsingRule>
```

The following rule extracts whatever text lies between the fifth occurrence of "here" and "there".

```
<ParsingRule Type="GetTag" Source="Source" Result="Replaced">  
<StartTag>here</StartTag>  
<EndTag>there</EndTag>  
<Index>5</Index>  
</ParsingRule>
```

## GetUrl

The GetUrl rule downloads a file from a URL into the Result container. The Source attribute is required, but ignored.

### Parameters:

Url (taggable): The URL to download.

### Example:

The following rule downloads the index.asp file from www.polycom.com and places its contents in the polycomHome container.

```
<ParsingRule Type="GetUrl" Source="" Result="polycomHome">  
<Url>http://www.polycom.com/index.asp</Url>  
</ParsingRule>
```

## InitCaps

The InitCaps rule converts to uppercase the first letter of every word in the Source container.

Parameters: None.

### Example:

```
<ParsingRule Type="InitCaps" Source="SomeSource" Result="Capitalized"  
>/>
```

## Lcase

The Lcase rule converts to lowercase all the letters in the Source container.

Parameters: None

**Example:**

```
<ParsingRule Type="Lcase" Source="SomeSource" Result="AllSmallLetters" />
```

**Left**

The Left rule extracts a specified number of characters from the beginning of the Source container.

**Parameters:**

- Length: The number of characters to extract from the beginning of the Source container.

**Example:**

If the LongString container contains "abcdefghijklmnopqrstuvwxy" then the following rule will place "abcde" in the ShortStuff container.

```
<ParsingRule Type="Left" Source="LongString"
Result="ShortStuff">
<Length>5</Length>
</ParsingRule>
```

**LeftTrim**

The LeftTrim rule removes a specified number of characters from the beginning of the Source container.

**Parameters:**

- Length: The number of characters to remove from the beginning of the Source container.

**Example:**

If the LongString container contains "abcdefghijklmnopqrstuvwxy" then the following rule will place "fghijklmnopqrstuvwxy" in the ShortStuff container.

```
<ParsingRule Type="LeftTrim" Source="LongString"
Result="ShortStuff">
<Length>5</Length>
</ParsingRule>
```



## Mid

The Mid rule extracts a string of a specified length from a specified starting character in the Source container.

### Parameters:

- Length: The number of characters to extract.
- Start: The character position in the Source container from which to extract the characters.

### Example:

If the LongString container contains "abcdefghijklmnopqrstuvwxy" then the following rule will place "efghijklmn" in the ShortStuff container.

```
<ParsingRule Type="Mid" Source="LongString"
Result="ShortStuff">
<Length>10</Length>
<Start>5</Start>
</ParsingRule>
```

## ParseDelimited

The ParseDelimited rule extracts a specific substring from a delimited string. A delimited string is a string made up of substring separated by a delimiting character. For example: "this,is,a,comma,delimited,string".

This rule is useful in parsing comma-separated-value files.

### Parameters:

- Delimiter: The delimiting character used to separate substrings.
- Index (optional): Which substring to extract.

### Example:

If the BigString container contains "this=is=a=short=string" then the following rule places "short" in the Token container.

```
<ParsingRule Type="ParseDelimited" Source="BigString"
Result="Token">
<Delimiter>=</Delimiter>
<Index>4</Index>
</ParsingRule>
```

## ReadTextFile

The ReadTextFile rule loads the contents of a text file into the Result container. The Source attribute is required, but ignored.

### Parameters:

- Filename: The path and name of the file to load.

### Example:

The following rule loads the contents of the C:\Test.txt file into the Tester container.

```
<ParsingRule Type="ReadTextFile" Source="" Result="Tester">
<Filename>C:\Test.txt</Filename>
</ParsingRule>
```

## Replace

The Replace rule replaces the all occurrences of a string of text with another string of text.

### Parameters:

- SearchText: The string to be replaced.
- NewText: The string to substitute in place of the SearchText string.

### Examples:

The following rule replaces all occurrences of "Goofy" in the Characters container with "Pluto".

```
<ParsingRule Type="Replace" Source="Characters"
Result="NoGoofy">
<SearchText>Goofy</SearchText>
<NewText>Pluto</NewText>
</ParsingRule>
```

The following rule removes all occurrences of "stars" in the Galaxy container.

```
<ParsingRule Type="Replace" Source="Galaxy" Result="DarkMatter">
<SearchText>stars</SearchText>
<NewText></NewText>
</ParsingRule>
```

## ReplaceCharacterCodes

The ReplaceCharacterCodes rule replaces all occurrences of various HTML character codes with their true characters.

Parameters: None

### Example:

```
<ParsingRuleType="ReplaceCharacterCodes"  
Source="SomeSource"  
Result="Capitalized" />
```

## ReplaceTag

The ReplaceTag rule replaces the text that occurs between a pair of strings.

### Parameters:

- StartTag (taggable): The starting delimiter of the text to replace.
- EndTag (taggable): The ending delimiter of the text to replace.
- NewText (taggable): The replacement text.
- Index (optional): Which occurrence of the delimited text to replace.

### Example:

If the BigString container contains "A or B or C or D" then the following rule places "A or B or baseball or D" into the Chuckle container.

```
<ParsingRule Type="ReplaceTag" Source="BigString" Result="Chuckle">  
<StartTag>or</StartTag>  
<EndTag>or</EndTag>  
<NewText> baseba11 </NewText>  
<Index>2</Index>  
</ParsingRule>
```

## Right

The Right rule extracts a specified number of characters from the end of the Source container.

### Parameters:

- Length: The number of characters to extract from the end of the Source container.

**Example:**

If the LongString container contains "abcdefghijklmnopqrstuvwxy" then the following rule will place "vwxyz" in the ShortStuff container.

```
<ParsingRule Type="Right" Source="LongString" Result="ShortStuff">
<Length>5</Length>
</ParsingRule>
```

## RightTrim

The RightTrim rule removes a specified number of characters from the end of the Source container.

**Parameters:**

- Length: The number of characters to remove from the end of the Source container.

**Example:**

If the LongString container contains "abcdefghijklmnopqrstuvwxy" then the following rule will place "abcdefghijklmnopqrstu" in the ShortStuff container.

```
<ParsingRule Type="RightTrim" Source="LongString" Result="ShortStuff">
<Length>5</Length>
</ParsingRule>
```

## SetValue

The SetValue rule places a literal string directly into the Result container.

The Source attribute is required, but ignored.

**Parameters:**

- Value (taggable): The value to return.

**Examples:**

The following rule places "twinkle" into the Eye container.

```
<ParsingRule Type="SetValue" Source="" Result="Eye">
<Value>twinkle</Value>
</ParsingRule>
```

If the Tear container contains "drop" then the following rule places "drop" in the Eye container.

```
<ParsingRule Type="SetValue" Source="" Result="Eye">
<Value>|Tear|</Value>
</ParsingRule>
```

## StrCat

The StrCat rule concatenates two strings, optionally adding a space between them.

The Source attribute is required, but ignored.

### Parameters:

- String1 (taggable): The string that will be the start of the result.
- String2 (taggable): The string that will be the end of the result.
- AddSpace (optional): If set to TRUE, a space is inserted between the String1 and String2.

### Examples:

The following rule places "eatcake" into the Food container.

```
<ParsingRule Type="StrCat" Source="" Result="Food">
<String1>eat</String1>
<String1>cake</String1>
</ParsingRule>
```

The following rule places "eat cake" into the Food container.

```
<ParsingRule Type="StrCat" Source="" Result="Food">
<String1>eat</String1>
<String1>cake</String1>
<AddSpace>true</AddSpace>
</ParsingRule>
```

If the Snack container contains "pizza" then the following rule places "eat pizza" into the Food container.

```
<ParsingRule Type="StrCat" Source="" Result="Food">
<String1>eat</String1>
<String1>|Snack|</String1>
<AddSpace>true</AddSpace>
</ParsingRule>
```

## Trim

The Trim rule removes any leading and trailing spaces from the Source container.

Parameters: None.

### Example:

If the LotsOfSpace container contains " hello " then the following rule places "hello" (without any leading or trailing spaces) in the LeanAndMean container.

```
<ParsingRule Type="Trim" Source="LotsOfSpace" Result="LeanAndMean" />
```

## TrimFromEnd, TrimFromStart, TrimToEnd and TromToStart

These four rules all remove some text from the source container. They all take the same parameter, SearchText. The rules differ in whether they trim the beginning or end of a string, and whether or not they include the SearchText value in the result.

### Parameters:

- SearchText: The first occurrence of this string will form the basis of the trimming.

### Examples:

Suppose the Source container contains "Mary had a little lamb". The following rule places " little lamb" (note the leading space!) in the MaryStuff container.

```
<ParsingRule Type="TrimToEnd" Source="Source" Result="MaryStuff">  
<SearchText>had a</SearchText>  
</ParsingRule>
```

The following rule places "ry had a little lamb" (everything after the first "a") in the MaryStuff container.

```
<ParsingRule Type="TrimToEnd" Source="Source" Result="MaryStuff">  
<SearchText>a</SearchText>  
</ParsingRule>
```

The following rule places "Mary " (note the trailing space!) in the MaryStuff container.

```
<ParsingRule Type="TrimFromStart" Source="Source" Result="MaryStuff">  
<SearchText>had a</SearchText>  
</ParsingRule>
```

The following rule places "M" (everything before the first "a") in the MaryStuff container.

```
<ParsingRule Type="TrimFromStart" Source="Source" Result="MaryStuff">  
<SearchText>a</SearchText>  
</ParsingRule>
```

## Ucase

The Ucase rule converts to uppercase all the letters in the Source container.

Parameters: None

### Example:

```
<ParsingRule Type="Ucase" Source="SomeSource" Result="AllBigLetters"  
>/>
```

---

# Appendix C: Configuration Files

This appendix outlines the procedure to change PDS Player settings via the Remote Manager. Please note that this appendix is intended only for sophisticated users. Contact Polycom Support before changing any configuration files.

## Changing Output Settings with the XPT.ini Configuration File

All Player Configuration Files are managed through the PDS Remote Manager.

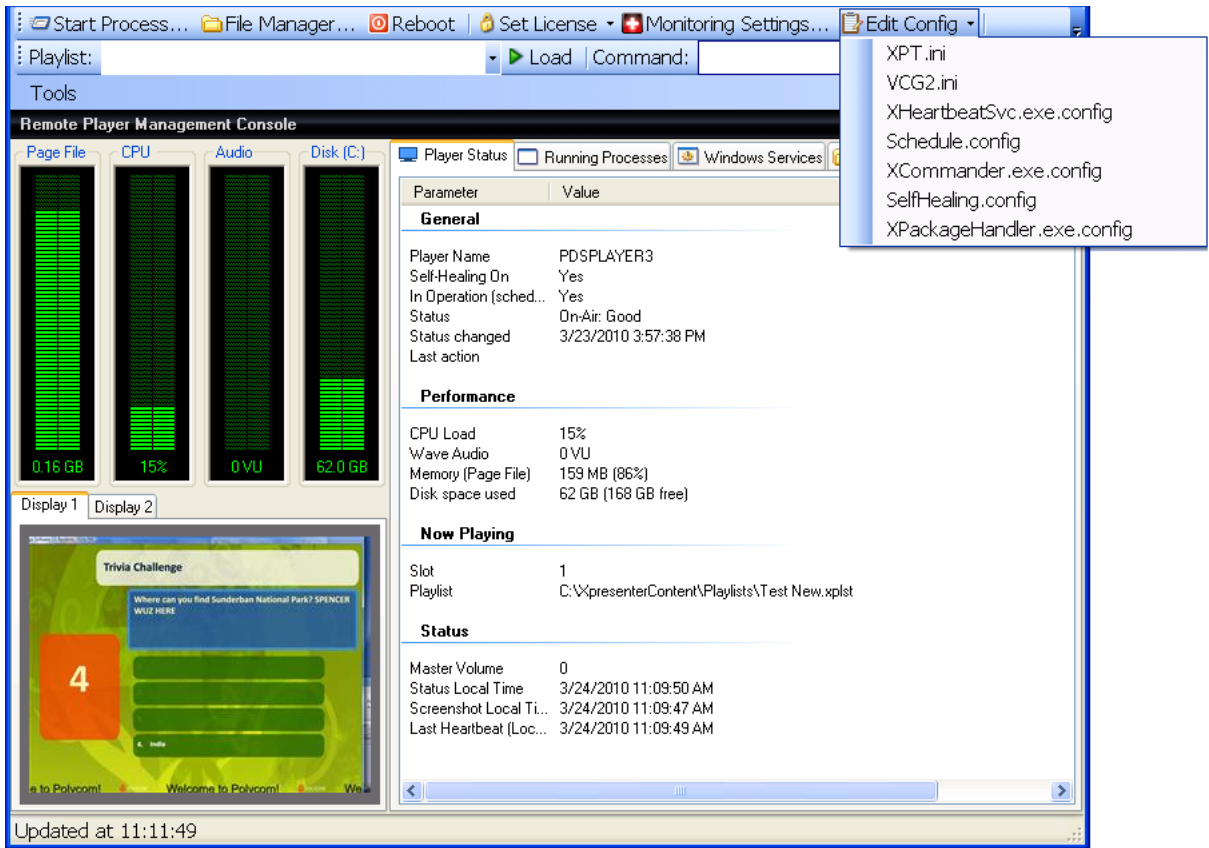


**NOTE:** Please contact Polycom Support before making changes to the configuration files.

### To access and edit the PDS Player Configuration Files:

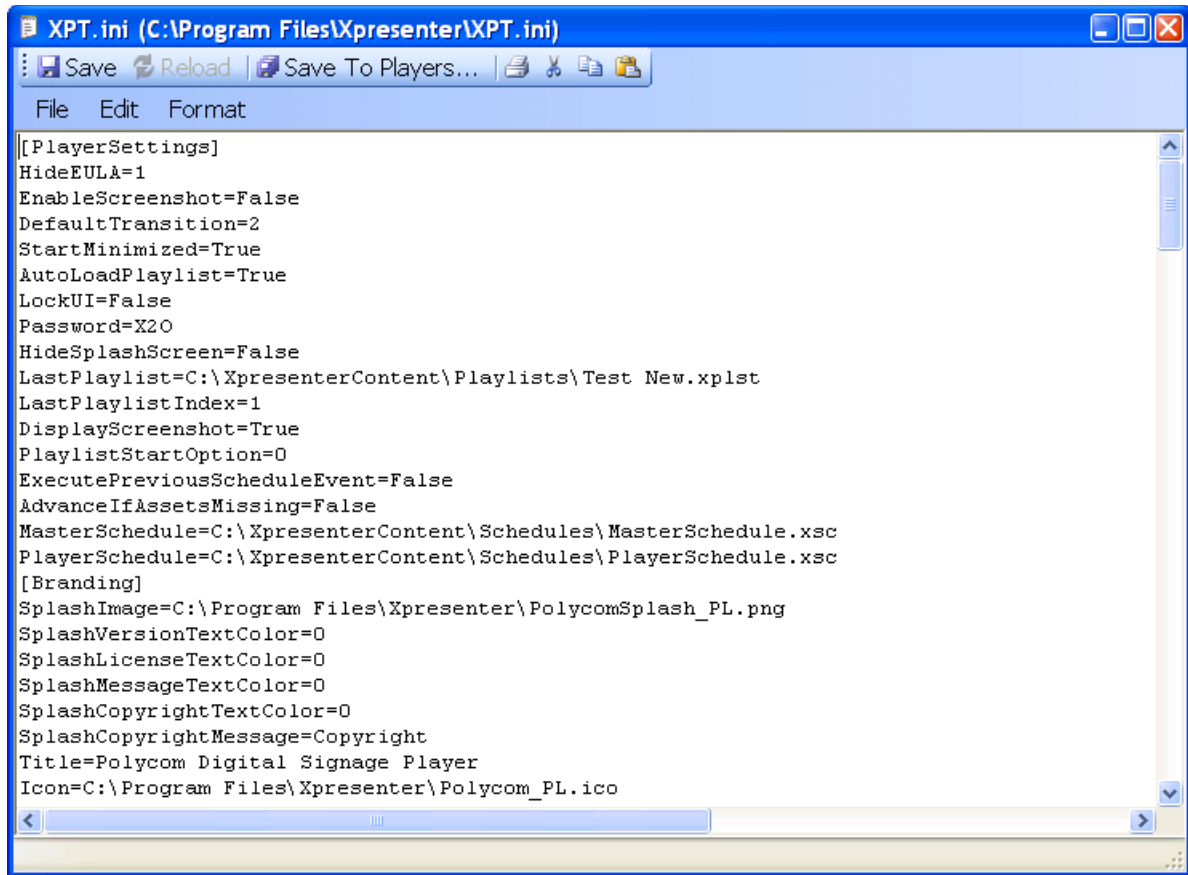
- 1 Launch Remote Manager.
- 2 Double-click on a Player in the Connections tab to launch the Remote Player Management Console.

- Click **Edit Config** in the Remote Player Management Console toolbar. A drop-down menu will appear.

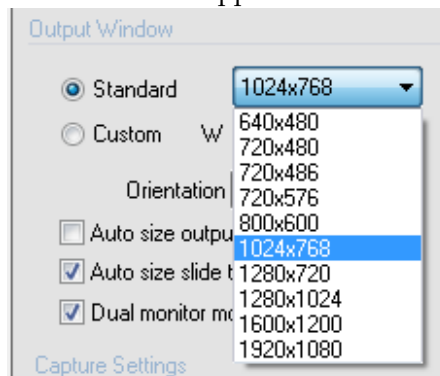




**4** Choose **XPT.ini**. The file editor will launch.



- 5** To change the output resolution of the target player or players:
- a** Scroll to [Output Settings].
  - b** If your Player uses one of the standard resolutions, enter a value for StandardOutputDims. Please note that this value corresponds to the order of appearance in the drop-down menu in the Player Settings.



Consequently, the following values apply at time of writing:

- » StandardOutputDims=0: 640x480 resolution.

- » StandardOutputDims=1: 720x480 resolution.
  - » StandardOutputDims=2: 720x486 resolution.
  - » StandardOutputDims=3: 720x576 resolution.
  - » StandardOutputDims=4: 800x600 resolution.
  - » StandardOutputDims=5: 1024x768 resolution.
  - » StandardOutputDims=6: 1280x720 resolution.
  - » StandardOutputDims=7: 1280x1024 resolution.
  - » StandardOutputDims=8: 1600x1200 resolution.
  - » StandardOutputDims=9: 1920x1080 resolution.
- 6** To set your Player output to Full Screen Mode:
    - a** Scroll to [Settings].
    - b** Ensure that FullScreen=True.
  - 7** To change your Player output orientation:
    - a** Scroll to [Output Settings].
    - b** For the default horizontal (i.e., 1024x768) output, set OutputMode=Landscape.
    - c** For vertical (i.e., 768x1024) output, set OutputMode=Portrait.
  - 8** To enable Dual Monitor Mode:
    - a** Scroll to [Settings].
    - b** Set DualMonitor=True.
    - c** To disable Dual Monitor Mode, set DualMonitor=False.
  - 9** To enable Full Screen Mode:
    - a** Scroll to [Settings].
    - b** Set FullScreen=True.
    - c** To disable Full Screen Mode, set FullScreen=False.
  - 10** To automatically resize the output for the monitor:
    - a** Scroll to [Output Settings].
    - b** Set AutoResizeOutput=True.
    - c** To disable, set AutoResizeOutput=False.



**NOTE:** All other elements of the XPT.ini file should not need to be user-configured. Contact Polycom Support before making changes to any element not detailed above.

- 11** When complete, click **Save to Players**.

- 12** In the Select Target Players dialog that appears, indicate to which Players you wish to save the changed configuration file. Click **OK**.
- 13** The Request window will appear. The file will update and the configuration changes should apply.
- 14** If configuration changes do not apply immediately, enter **RESTART** in the **Command** space of the Remote Player Management Console. The Player will restart and the changes will have been applied.

